DOCUMENT RESUME

ED 123 425 CE 007 163

AUTHOR	Brown, Thomas E.
TITLE	The S.R.D. Ministry Plan Book: A Guide for Surveying Personal Resources and Planning Development in Ministry: The Consultant's Manual.
INSTITUTION	Center for Professional Development in Ministry, Lancaster, Pa.
PUB DATE	76
NOTE	120p.
AVAILABLE FROM	The Center for Professional Development in Ministry, 561 College Avenue, Lancaster, Pennsylvania 17603 ($12.50)
EDRS PRICE	MF-$0.83 Plus Postage. HC Not Available from EDRS.
DESCRIPTORS	*Clergymen; Consultation Programs; *Developmental Programs; Group Activities; Individual Activities; Manuals; *Personal Growth; *Program Descriptions; *Program Planning; *Religious Education; Role Perception

ABSTRACT

The manual is designed for the use of religious leaders to assist them in the development and planning of strategies that will increase effectiveness and meaning in the ministry. The document is presented in two parts. The first section (38 pages) contains a discussion of the purpose, design, and uses of the plan book. Three schedules for professional development, planning retreats, and group planning charts are provided, as well as training and information sources for consultants. Comments on the exercises and procedures presented in the plan book are presented and focus on role clarification, abilities analysis, characteristics survey, knowledge inventory, summary profile of self, role effectiveness profiles, role effectiveness evaluation, check for meaning, developmental needs summary, and developmental planning guide. The second section consists of four parts containing the exercises and procedures referred to in the first section. The divisions are: (1) clarification of roles, analysis of ability, survey of characteristics, and inventory of knowledge; (2) the individual's guide to consultation; (3) role effectiveness analysis; and (4) developmental planning guide. (EC)

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THE CONSULTANT'S MANUAL

FOR

THE S.R.D. MIN. PLAN BOOK

(1976 Edition)

a guide for

Surveying Personal Resources & Planning Development in Ministry

by

Thomas E. Brown

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PREFACE

THE first year with the PLAN BOOK was a good one--a lot of work, some fun, a great deal of insight developed about the book and the process, a number of new colleagues and friends discovered in its use.

AS indicated in the first manual, I am writing again in the first person to maintain the point that the purpose of the book continues to be to share my insight and approach in a way that others can utilize it, and to emphasize again that while we have much more experience now with the book and the process, we yet must say that we cannot empirically demonstrate proof (or disproof, for that matter) the explicit and implicit vocational development and life planning theories on which they are based. My own insight is now balanced by that of others who have participated in the use of the book over the first year, and their input has resulted in the revision, but I must take responsibility for the procedures suggested. I know they work, and I know they have worked to benefit most persons who have experienced them with me, but I cannot claim empirical proof of that or guarantee that they will work for someone else.

WHILE we have substantially reduced the amount of work involved in "doing the Plan Book," we must say again, as we did in the first manual, that there are simpler, faster, less demanding processes available for assisting one in reviewing, evaluating and planning with respect to professional development in ministry. The Plan Book and the process of consultation which its use involves will be most appreciated by persons who recognize that developmental planning is a testing of values, a part of one's search for meaning, and will probably have critical impact upon life later. The time and energy invested in this approach is worth it when seen in that light.

I should like to thank those who have participated in the Plan Book process with me in the past fifteen months, both in retreats for clergy, et al, and in workshops for professional development leaders. They are too numerous to name here, but I learned much from them, and some of what I learned is indicated in the changes which have been made in the book and in the recommended process for its use.

THOMAS E. BROWN

THE CENTER FOR PROFESSIONAL DEVELOPMENT IN MINISTRY
LANCASTER, PENNSYLVANIA
MARCH 15, 1976

THE SURVEY OF RESOURCES FOR DEVELOPMENT IN MINISTRY PLAN BOOK

MANUAL FOR LEADERS

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INTRODUCTION: PURPOSE/DESIGN/USE/SCHEDULES

A. THE PLAN BOOK PURPOSES AND OBJECTIVES

IN the Preface to the PLAN BOOK, I have said that the purpose of the book is to assist one in the shaping of a developmental strategy which will lead to increased effectiveness and meaning in ministry. Why this emphasis on both effectiveness and meaning? In the answer to that question lies one of the keys to the book's method and intent.

THE other key is found in the Introduction to Part II. A point is made there of the importance of personal responsibility for being effective and for finding meaning.

THESE emphases will be better understood if I share some of the assumptions, or beliefs, which I have either developed or had affirmed over the years of working with religious leaders in their search for effectiveness and purpose. Shaped by this involvement with men and women, pastors of small rural, great suburban and struggling city churches, sisters, priests, administrators, professors, students, employed and unemployed, faithful and faithless, enthusiastic and defeated, healthy and unhealthy; and also by the struggle within my own soul to make sense of it all theologically and psychologically, professionally and personally, these presuppositions now influence most of what I do and say. They have greatly influenced the development of the PLAN BOOK, as it has grown out of my own consulting experience. They are:

1. A belief that religion is best served by leaders who are inner-directed. It is difficult to be inner-directed in a world which is structured to reward outer-directedness, which demands acceptance of the ethic of pleasing as many of all the people as much of the time as is possible. As a religious leader, it is even more difficult when faced with so many well-meant efforts by responsible persons to convert clergy, and other religious leaders, into popular managers of voluntary organizations. How does one, when constantly encouraged to base ministry upon the common denominator of opinion about what works best, maintain a sense of theological integrity and purpose? He or she begins to do it by developing self-understanding, an understanding of self which is related to intentional ministry. The PLAN BOOK provides a process for developing that self-understanding.

2. A belief that effectiveness in ministry follows upon clarity of intention. To appraise effectiveness without adequate attention to the WHY of it all is to do damage to the personhood of the one who is trying to minister. Performance effectiveness is important, for ministry is in the doing, and this is emphasized throughout the PLAN BOOK, but it must be done in a context of concern for WHY. This WHY cannot be assumed. More importantly, it cannot be presupposed

that the WHY is answered when the usual general affirmations have been expressed. Rather, the WHY must be searched out in a close examination of the life of the individual as expressed in what he or she intends to do in ministry, has done in ministry, might do in ministry. It should be said that no argument is made that the PLAN BOOK itself does this sufficiently. To instrument adequately the WHY is a task I have not found a way to complete, but the structure for the asking and answering of the WHY is there. Consultants and colleagues must call attention to it and struggle with it, in the light of what is said and not said in response to the book.

3. A belief that intentionality can best be acted out when one is aware of the nuances of its expression through roles, which in function must utilize certain knowledge and abilities and characteristics.

4. A belief that those who lead others in a search for meaning must themselves find satisfaction in the primary elements of the roles they act out in that leadership, in the tasks they perform. If in the means there is not purpose, no sense of real being, which is connected with intentionality, it is doubtful that the end result will be meaningful except for the most goal-oriented person.

5. A belief that the Incarnate God who presents personhood as evidence of presence cannot be served with theological integrity or psychological wholeness by persons who themselves deny their own personhood in an effort to be effective in religion.

6. A belief that, as personhood is discovered and expressed through knowledge, abilities and characteristics (and in all of these reside the values of the individual) of the leader, his or her effectiveness will be enhanced in substantial ways which are congruent with his or her person and the purposes of the religious organization in which leadership is exercised.

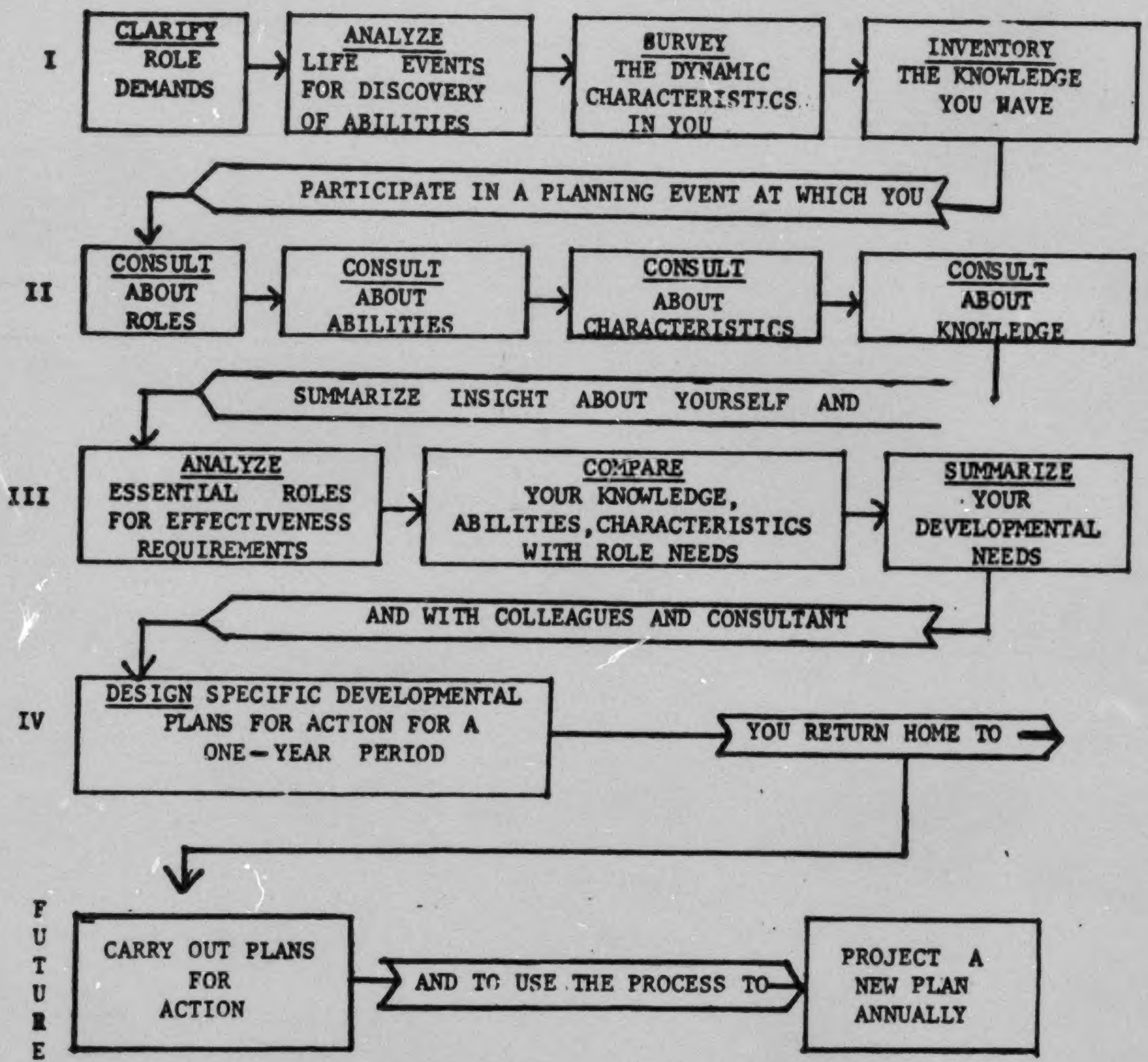
7. A belief in the power of colleagueship, when it is properly catalyzed and channeled, to provide a creative dynamic in which insight and motivation can occur simultaneously.

8. A belief that it is as important for religious leaders to learn a process for self-assessment and developmental planning as it is for them to gain current insight and to make current plans.

9. A belief that wholeness of life and clarity of intention is worth a heavy investment of energy in self-reflection, analysis, dialogue and planning, on a continuing basis, throughout life.

AS you try to use the PLAN BOOK with others, it is my hope that you will keep these beliefs on which it is based in mind. I hope, too, that you will clarify and share with those you lead your intentionality, and that by so sharing you will use the PLAN BOOK as a supplement to yourself, as a help in offering your concern and your wisdom to those whom you mentor.

A SCHEMATIC VIEW OF THE PLAN BOOK PROCESS


I
CLARIFY ROLE DEMANDS
ANALYZE LIFE EVENTS FOR DISCOVERY OF ABILITIES
SURVEY THE DYNAMIC CHARACTERISTICS IN YOU
INVENTORY THE KNOWLEDGE YOU HAVE
PARTICIPATE IN A PLANNING EVENT AT WHICH YOU
II
CONSULT ABOUT ROLES
CONSULT ABOUT ABILITIES
CONSULT ABOUT CHARACTERISTICS
CONSULT ABOUT KNOWLEDGE
SUMMARIZE INSIGHT ABOUT YOURSELF AND
III
ANALYZE ESSENTIAL ROLES FOR EFFECTIVENESS REQUIREMENTS
COMPARE YOUR KNOWLEDGE, ABILITIES, CHARACTERISTICS WITH ROLE NEEDS
SUMMARIZE YOUR DEVELOPMENTAL NEEDS
AND WITH COLLEAGUES AND CONSULTANT
IV
DESIGN SPECIFIC DEVELOPMENTAL PLANS FOR ACTION FOR A ONE-YEAR PERIOD
YOU RETURN HOME TO
FUTURE
CARRY OUT PLANS FOR ACTION
AND TO USE THE PROCESS TO
PROJECT A NEW PLAN ANNUALLY

C. STRUCTURE AND ARRANGEMENT

THE schematic outline illustrates the logical structure of the PLAN BOOK. One moves through it from self-assessment into consultation, which involves further private reflection, toward the development of specific developmental plans based on insight about intentionality, as expressed in roles, and the knowledge, abilities and personality enhancement needed to fulfill that intentionality with meaningful effectiveness. While this may not be clear to respondents as they begin to work through the book, it becomes so as they get further into it, and, in my experience, is enthusiastically clear to them as they complete their first Development Plan for Action.

ANOTHER objective in the design is that persons will learn a process as well as develop some current plans. This is most important for the consultant to keep in mind as it is all too easy to take that opportunity away through a consulting style which gives answers instead of helping to find them. This is probably a greater danger in private consultation than in group, but must be remembered always. Also, there is some danger that the PLAN BOOK may be used mechanistically. Because there is an effort to lead from one step to another in a logical fashion, it is possible to work through the whole thing like climbing steps. Avoidance of doing this in a tiring way will depend upon the consultant more than the users: your flexibility, creativity, encouragement to use the book rather than be used by it, are most significant. Serendipity can happen even with a process as structered as this one if the consultant can risk it. Let the process happen, even when all does not seem in order; insight, rather than chaos, will usually be the result. There should be attention to detail, of course, and particularly in places where persons are most likely to "read rapidly" and miss important points (such as with introductions), but avoid laboriously working through every instruction to the point of exhaustion.

ALTHOUGH all sections of the PLAN BOOK are designed to be part of a total process, it is printed in such a way that a consultant can utilize the booklets of Part I in a variety of ways without having to use the consultation unit. Also, any one of the four booklets in Part I can be used as a special tool in the context of a specific relationship or purpose which is not conducive to the whole process. They are printed and folded to allow for that use. No reference to the PLAN BOOK is made in them.

D. PREPARATION FOR GROUP OR INDIVIDUAL CONSULTATION

IT is important to allow sufficient time ahead of consultation for a person to complete all booklets of Part I. As much as possible, I allow three weeks lead time; that is, I want individuals to receive the booklets of Part I at least three weeks ahead of the consultative event. They require a minimum of four hours and many spend much longer on them. Also, if personality tests are being used, they should be completed before Part I is put into the hands of the persons.

ENCOURAGE participants to keep evenings unobligated during the consultation days. This is particularly important if the event is being held where commuting home at night is possible. A look at the schedule designs tells the importance of this encouragement.

E. SUGGESTIONS FOR GROUP USE

THREE days is the minimum time for using the whole process with a group. A longer period is recommended if it is at all feasible. The three and one-half day schedule offered herein is to be preferred.

A weekly group approach could also be followed, though no less than five six-hour days should be allowed.

IN the schedule for three days, a total of 17 hours is spent in group tasks related to the PLAN BOOK; the design for 3½ days uses 20 hours of group time. When there is loss of involvement due to the spread of days over several weeks, more time is needed than in the residential event.

1. SCHEDULES. Suggested schedules follow on Pages 11,12,13 & 14. These pages share some schedules I have found workable, though I seldom follow any schedule rigidly with every group: adjustments are almost always necessary. One must be careful, however, not to distort the entire experience by spending too much energy in one area and insufficient in another. The judgment of the consultant is critical in this regard. The discipline of adhering to the times suggested usually encourages spontaneity. Occasionally, though, a group will experience stress in relation to time allowed. You must judge how to respond to that stress. Sometimes fifteen or thirty minutes is worth three hours, when allowed at the right moment.

2. SETTING. The best setting for a group experience is a retreat or conference center where the atmosphere is conducive to reflection and dialogue. Wherever it is held, however, the most important thing is that group participants be protected against interruption for anything other than emergencies. It is preferable for meals to be taken together. A room large enough for the whole group and small meeting rooms or corner space large enough for quads to meet without disturbing one another are essential.

3. EQUIPMENT AND MATERIALS. In addition to the PLAN BOOK, you may occasionally need extra copies of Pages 12-19 of Part III. (You may Xerox those pages yourself or the CPDM office can furnish extras for nominal printing and mailing costs. If you copy them yourself, be sure to use punched paper. This is permission to copy only those pages; it is not permission to copy any other part of the PLAN BOOK.) You will need a chalkboard or newsprint and stand. A large chalkboard is preferable.

IT is important that a table large enough for nine to work at comfortably be available as well as tables at which quads can work without disturbing others. Having some easy chairs around for occasional use during off-time and when group involvement does not involve writing is an appreciated luxury.

4. SEE "Planning with Groups Which Continue" (Page 15) for special purpose materials you may need.

5. GROUP SIZE. The group designs included in the Manual are for a maximum of eight participants and a leader. If more than eight (even one more) are to be involved, it is essential that the time be extended or that there be co-leaders. I use and recommend one co-leader for every four persons beyond eight. This can be a person fully trained in the process, which adds strength, of course, or it can be a person who has been trained specifically to work in this event with you. You should allow, in the latter case, however, for a day or two of orientation and discussion ahead of the event.

6. GROUP COMPOSITION. This process works with persons of all ages and experience in ministry. I have used it successfully with groups composed entirely of one age range and with groups composed of one young and seven older persons and of one older and seven younger. Group process and consulting style is more important than the age mixtures in the group, unless it is the objective of the program under which the event is held to provide developmental planning related to special periods of life or ministry, such as early ministry, mid-life and pre-retirement. Otherwise, there need not be great concern about wide differentials of age and experience in the group, for general use of the process.

7. GROUP PROCESS. The work is done in QUADS and in the whole group sitting together. Thus, in a group of eight, part of the introductory period is used organizing the group into quads. These should remain the same throughout the event unless to do so would be counter-productive due to inability to relate. The choice of these quads can be done according to group process methods or simply by allowing persons to "choose-up." I have found that one way works about as well as another, the objective being to have each person working with a quad which is enjoyable and helpful. Some quads will need more help from you than will others, no matter how you divide them up at the beginning.

IT is important to use good group process methods in the consultation. This means keeping in mind that a major objective is to help the participants learn the process and develop a sense of competence in it; the consultant who has all the answers and who controls everything that happens will torpedo that objective. Another objective for me is to illustrate in a dynamic way what benefit derives from peer consultation. This is not essential to the efficacy of the PLAN BOOK process, or to every event, but it is a strengthening of the ministry when it happens.

8. THE CONSULTANT'S ROLE. Your role is, of course, structured by the remarks made above under Group Process, and by the purpose of the group (below). In any case, it is one of supervision of the entire process in a style which clarifies instructions, enables group dialogue, shares resources which are not known by the group members, make connections which are overlooked in group dialogue, and provides test interpretation (if tests are used). As mentioned earlier, maintaining an atmosphere in which tasks can be accomplished while allowing for creativity, or serendipity, and for individual differences, is important. In no case should the consultant force persons to do more than they are ready to do, or to share material about themselves which they are reluctant to share.

9. EVENT PURPOSES. Some events conducted with the PLAN BOOK process will be with groups of strangers who are together for this one event, for the purpose of using the group setting to work out individual plans. It is also possible to structure the event for a specific purpose, such as helping a D.Min. group make individual and group plans for participation in a particular D.Min. program; helping a team ministry plan for development of the team and of the individuals on the team; helping a religious community plan for the work of the community and the development of individuals in the community. In those cases, the consultant must be aware of the purposes of the organization involved. See the section of this Manual on "Planning for Groups Which Continue" (Page 15).

10, FOLLOW-UP. There is great advantage to having one or two-day follow-up sessions about a year after the group first participates in the process. Alternatively, private follow-up is very valuable for extending the benefit of the approach and should be encouraged--between peers and between consultant and participants.

F. SUGGESTIONS FOR PRIVATE CONSULTATION

MUCH of what is said above about group consultation is also applicable to the private situation, so I shall not repeat it here. The differences are in relation to amount of time spent in consultation. The sequence is the same. Those of you familiar with the first manual will note the change from two to two and one-half days, to allow more time for reflection and relieve pressure upon both parties.

IT is well for the private work done during the day to be done in or near the office of the consultant so that the client can raise questions and seek help with "bog-downs" from either the consultant or an assistant.

WHILE the design calls for two and one-half days, and assumes a general purpose consultation, there are many alternatives: weekly private sessions with individual, joint consultations with a small team ministry, one-day consultations related to just one section or part of the PLAN BOOK.

ONE advantage of the group process over the individual is the strength of group resources. In the private consultation, the consultant must be even more careful not to take away the opportunity for the individual to be self-responsible. The ideal process is for the client to see the consultant as an aid in a process the client is conducting rather than the other way around. This does not mean that the consultant should be passive. He or she must be prepared to directly suggest as well as to help in clarification if the process is to help as much as it is designed to help.

PROFESSIONAL DEVELOPMENT PLANNING RETREAT

THREE DAY PROGRAM SCHEDULE

FIRST DAY

HOUR	TASK	PLAN BOOK REFERENCE
10:00 a.m.	Get Acquainted	Entire Book
	Review Objectives	IV (blue), Plan for Action
	Choose Quads	
11:45	Introduce Part II	Part II (yellow)
12:00 N	Lunch	
1:00 p.m.	Consultative Review 1	Role Clarification (green)
	a. Work in Quads	II (yellow), Page 2
3:15	Coffee	
3:30	b. Work in Group	
4:15	Introduce Eve. Assignment	
Evening	Do Role Effectiveness Profiles	III (cherry), Pages 1-19

SECOND DAY

HOUR	TASK	PLAN BOOK REFERENCE
8:30 a.m.	Consultative Review 2	Ability Analysis (brown)
	a. Work in Group	II (yellow), Page 3
9:30	Worship	
10:00	Coffee	
10:15	b. Work in Quads	II (yellow) Page 3
12:00 N	Lunch	
2:00 p.m.	Consultative Review 3	Characteristics Survey (salmon)
	Work in Group	II (yellow), Page 4
4:30	Adjourn	
Evening	Complete Worksheets	II (yellow), Pages 3 & 4
		III (cherry), Page 22

THIRD DAY

HOUR	TASK	PLAN BOOK REFERENCE
8:30 a.m.	Consultative Review 4	Knowledge Inventory (grey)
	Work in Quads	II (yellow), Page 5
9:30	Worship	
10:00	Coffee	
10:15	Summary Work	II (yellow), Page 6
	Work in Quads	
10:45	Evaluative Review	III (cherry), Pages 20-24
	Work in Quads	
12:00 N	Lunch	
1:30 p.m.	Planning	II (yellow), Page 6
	Work in Group	III (cherry), Page 24
		IV (blue), Plan for Action
1:45	Person 1:	
2:15	Person 2:	
2:40	Person 3:	
3:00	Person 4:	
3:15	Break	
3:30	Person 5:	
3:45	Person 6:	
4:00	Person 7:	
4:15	Person 8:	
4:30	Adjourn	

PROFESSIONAL DEVELOPMENT PLANNING RETREAT

THREE AND ONE-HALF DAY SCHEDULE

FIRST DAY

HOUR	TASK	PLAN BOOK REFERENCE
10:00 a.m.	Get Acquainted	Entire Book
	Review Objectives	IV (blue), Plan for Action
	Choose Quads	
11:45	Introduce Part II	Part II (yellow)
12:00 N Lunch		
1:00 p.m.	Consultative Review 1	Role Clarification (green)
	a. Work in Quads	II (yellow), Page 2
3:15 Coffee		
3:30	b. Work in Group	
4:15	Introduce Evening Assignment	
Evening	Do Role Effectiveness Profiles	III (cherry), Pages 1-19

SECOND DAY

HOUR	TASK	PLAN BOOK REFERENCE
8:30 a.m.	Consultative Review 2	Ability Analysis (brown)
	a. Work in Group	II (yellow), Page 3
9:30 Worship		
10:00 Coffee		
10:15	b. Work in Quads	II (yellow), Page 3
12:00 N Lunch		
2:00 p.m.	Consultative Review 3	Characteristics Survey (salmon)
	Work in Group	II (yellow), Page 4
4:30 Adjourn		
Evening	Complete Worksheets	II (yellow), Pages 3 & 4
		III (cherry), Page 22

THIRD DAY

HOUR	TASK	PLAN BOOK REFERENCE
8:30 a.m.	Consultative Review 4	Knowledge Inventory (grey)
	Work in Quads	II (yellow), Page 5
9:30 Worship		
10:00 Coffee		
10:15	Summary Work	II (yellow), Page 6
	Work in Quads	
10:45	Evaluative Review	III (cherry), Pages 20-24
	Work in Quads	
12:00 N Lunch		

(OVER)

HOUR	TASK	PLAN BOOK REFERENCE
2:00 p.m.	Planning Work in Group	II (yellow), Page 6 III (cherry), Page 24 IV (blue), Plan for Action
2:15	Person 1:	
3:00	Person 2:	
3:30	Break	
4:00	Person 3:	
4:30	Adjourn	

FOURTH DAY

HOUR	TASK
8:30 a.m.	Planning Continued
9:00	Person 5:
9:30	Worship
10:00	Coffee
10:30	Person 6:
11:00	Person 7:
11:30	Person 8:
12:00 N	Adjourn

INDIVIDUAL PROFESSIONAL DEVELOPMENT PLANNING CONSULTATION

TWO AND ONE-HALF DAY SCHEDULE

FIRST DAY

HOUR	TASK	PLAN BOOK REFERENCE
10:00 a.m.	Get Acquainted Review Objectives	Entire Book IV (blue), Plan for Action
11:00 - 12:00 N	Consultative Review 1	Role Clarification (green) II (yellow), Pages 1 & 2
1:00 p.m.	Private Work	II (yellow), Page 2
2:00 - 3:30	Consultative Review 2	Abilities Analysis (brown) II (yellow), Page 3
3:30 - 4:00	Explain Evening Assignment	
Evening	Do Role Effectiveness Profiles	III (cherry), Pages 1-19

SECOND DAY

HOUR	TASK	PLAN BOOK REFERENCE
9:00 a.m. -11:00	Consultative Review 3	Characteristics Survey (salmon) II (yellow), Page 4
11:00 - 2:00	Private Work	II (yellow), Page 4 III (cherry), Page 22
2:00 - 3:00	Consultative Review 4	III (cherry), Page 22
3:30 - 4:30	Consultative Review 5	Knowledge Inventory (grey) II (yellow), Page 5
Evening	Complete PLAN BOOK....	II (yellow), Page 6 III (cherry), Pages 20-24

THIRD DAY

HOUR	TASK	PLAN BOOK REFERENCE
9:00 a.m. -11:00	Consultative Review 6	III (cherry), Page 24
10:00 -12:00 N	Planning Consultation	IV (blue)

J. PLANNING WITH GROUPS WHICH CONTINUE

ONE of the most effective applications of the PLAN BOOK process is to planning with clusters of professional persons who wish to work together over a period of time. This could be a multiple staff team, a degree program group (as in some D.Min. programs), or a "contract learning" group (such as six or eight regional clergy who wish to study together).

WHEN this is the objective, it is necessary, after completing individual designs for each member of the group, to help the group design "Developmental Units." These units should be shaped to meet some of the developmental needs of each individual in the group. Also, if organizational objectives or policies are applicable to the situation, these must be kept in mind in outlining the units. The process for designing them, therefore, calls for collaboration, not persuasion. What is designed will become part of Category C, "Colleague Groups," on the individual Developmental Plans for Action worksheets (blue).

TO do a group plan, the three-day program, as presented on Page 11 of this Manual, must be extended by at least half a day. I, myself, will no longer agree to do this if only three days are allowed for the entire event.

THE procedure for designing the group units is outlined on the Group Planning Charts which follow on Pages 17,18, & 19. They should be used as follows:

GROUP PLANNING CHART 1: To complete this chart, ask each participant to share the top three developmental needs in each area (Knowledge, Abilities, Characteristics) from Page 24 of Part III (cherry) and list these on a chalkboard or newsprint in an arrangement like that of the chart. (Alternatively, you may reproduce the chart and have every group member fill in one as each person calls off the top three priorities, but this is not as effective for group process.)

WITH this information in front of the group, note the congruence there is in each area and see if consensus can be quickly reached about the top three (in each area) which should have group priority. This should be done by consensus, not majority opinion; if consensus is not forthcoming, leave this information in front of the group and proceed to the second chart.

GROUP PLANNING CHART 2: Following the procedure outlined above, complete Chart 2 by asking for indication of the top three role enhancement priorities of each person. These priorities can be developed by each from Step Three of the Developmental Plan for Action or from Page 2, Part II (yellow). With this information in front of the group, work toward consensus about role focus for group attention, referring to the developmental needs priorities developed in Chart 1. Ordinarily, the group immediately sees a great deal of congruency and has little trouble deciding upon role development priorities. Within the top three roles, there usually will be congruency about either specific roles or developmental needs (Knowledge, Abilities or Characteristics) which can be developed through focus upon several alternative roles. Try to obtain agreement upon at least one role focus (two or three if they are similar roles) and move on to Chart 3.

GROUP PLANNING CHART 3: There are eight steps in the completion of this chart:

1. In the Unit One column, write into Block (a) the role focus agreed upon.
2. Referring to Group Planning Chart 1, determine which developmental needs priorities relate to the role in Block (a) and enter these in Blocks (b), (c) and (d). If at all possible, keep this to the top three.
3. Determine the methods which are preferable in the light of the developmental needs priorities. Types of methods include experiential laboratories, case study, lectures, reading, audio-visuals, etc.
4. List in Block (f) the names of any resource persons which you or members of the group suggest.
5. List in Block (g) any bibliography you or group members may suggest.
6. Determine the date objectives (starting and finishing) and enter them on the top line of the column.
7. Determine the number of weeks and the hours per week the group wishes to work together in this unit; enter these on the second line.
8. Determine who in the group is willing to serve as coordinator for arranging with resource persons, setting dates and meeting places, etc.

IF there is time, do similar planning for Units Two and Three. However, just as with the individual planning, it is more important that the group learn well the process by doing Unit One carefully. If the process has been learned, the group can complete the chart later.

GROUP PLANNING

CHART 1

SUMMARY OF DEVELOPMENTAL NEEDS PRIORITIES

		PERSON			
	Priority No.	A:	B:	C:	D:
KNOWLEDGE	1				
	2				
	3				
ABILITIES	1				
	2				
	3				
CHARACTERISTICS	1				
	2				
	3				

		PERSON			
	Priority No.	E:	F:	G:	H:
KNOWLEDGE	1				
	2				
	3				
ABILITIES	1				
	2				
	3				
CHARACTERISTICS	1				
	2				
	3				

GROUP PLANNING

CHART 2

ROLE ENHANCEMENT PRIORITIES

Priority	PERSON			
	A:	B:	C:	D:
FIRST				
SECOND				
THIRD				

Priority	PERSON			
	E:	F:	G:	H:
FIRST				
SECOND				
THIRD				

GROUP PLANNING

CHART 3

OUTLINE OF PROJECTED DEVELOPMENT UNITS

INTENDED BY____ FOR THE YEAR
Name of Group

BEGINNING______________, 19__

UNIT:	UNIT ONE	UNIT TWO	UNIT THREE
DATES OBJECTIVE			
Number Weeks/Hours			
COORDINATOR			
ROLE(S) FOCUS	(a)	(a)	(a)
KNOWLEDGE EMPHASES	(b)	(b)	(b)
ABILITIES EMPHASES	(c)	(c)	(c)
CHARACTERISTICS EMPHASES	(d)	(d)	(d)
DESIRED METHOD(S)	(e)	(e)	(e)
RESOURCE PERSON(S) (Tentative)	(f)	(f)	(f)
BIBLIOGRAPHY (Tentative)	(g)	(g)	(g)

K. TRAINING AND INFORMATION SOURCES FOR CONSULTANTS

THE PLAN BOOK requires much of the consultant who leads persons through the process it facilitates. Those who use it effectively do not simply fill in "a questionnaire" or "check off the boxes" or mechanically follow out the instructions. They are involved in an experience which includes dialogue with themselves and with their colleagues in ministry.

CONSULTATIVE dialogue strengthens this process and intensifies the experience since the consultant is seen as an authority figure whose intervention is critically significant. The impact of the experience will continue to feed in on the individual long after the PLAN BOOK itself is set aside--and that impact is likely, in many cases, to be broader than the exercises of the PLAN BOOK are designed to overtlv precipitate. The very meaning of life is being touched upon throughout; the value system of the individual is being tapped, confirmed or challenged, as professional identity and its consequence for intentionality is influenced.

THE competency, experience, wisdom, and creative flexibility of the consultant is thus of great import to the effective and ethical use of the PLAN BOOK. While one of the objectives in preparing and offering it to others has been to extend the availability of this approach, it is not intended that this process be used by consultants who are not able to supervize its use in a context of trained and tested competency to help persons struggle with problems of identity as well as of effectiveness.

EVEN if you have credentials which will enable you to purchase and use the materials without restriction, you may want to engage in some training or consultation, certainly some reading, related to occupational diagnosis and counseling if you have not concentrated much in that area previously. As I write this I am aware that you probably do not need to hear this, but I need to say it! You will recognize the areas in the PLAN BOOK procedure with which you feel comfortable and those with which you feel a need for further knowledge and experience.

IN addition to human relations and counseling skills, including the ability to recognize the symptoms of abnormality and judge what should be done in the light of them, which it is assumed qualified consultants will already possess, the following are areas of knowledge and skill which the PLAN BOOK process requires, as basics:

The Psychology of Occupational Development, particularly as it relates to middle-life developmental crises and decisions.

Learning Theory and Educational Design.

Occupational Ability Analysis, including occupational information and job analysis.

The Psychology of Religious Experience, particularly in relation to the nature of the religious leadership.

Role Theory and Analysis.

Career Development Counseling Techniques.

FOLLOWING is a listing of readings which you may find helpful in your use of the PLAN BOOK and a listing of information resources. If you are not already on the mailing lists which derive out of an association with the information resources mentioned, it would be advisable to get your name on them. You will receive much information useful when helping others complete a Plan for Action.

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U.S. Department of Labor. The Occupational Outlook Handbook.

INFORMATION SOURCES

Academy of Parish Clergy, 409 Greenfield Street, Oak Park, Illinois 60302.

American Management Associations, 135 W. 50th Street, New York, New York 10020.

American Personnel and Guidance Association, 1607 New Hampshire Avenue N.W., Washington, D.C. 20009.

Association of Theological Schools, P.O. Box 396, Vandalia, Ohio 45377.

Association for Clinical Pastoral Education, 475 Riverside Drive, New York, New York 10027.

Association for Creative Change, Rt. 1, Box 35A, Chelsea, Alabama 35043.

Enablement, Inc., 8 Newbury Street, Boston, Massachusetts 02116.

Institute for Advanced Pastoral Studies, 380 Lone Pine Road, Bloomfield Hills, Michigan 48013.

Mid-Atlantic Training Committee, Suite 325, 1500 Massachusetts Avenue N.W., Washington, D.C. 20005.

National Council on Family Relations, 1219 University Avenue S, Minneapolis, Minnesota 55414.

NTL Institute, P.O. Box 9155, Rosslyn Station, Virginia 22209.

Religious Research Association, Inc., P.O. Box 228, Cathedral Station, New York, New York 10025.

Society for Scientific Study of Religion, P.O. Box U68A, University of Connecticut, Storrs, Connecticut 06268.

Society for the Advancement of Continuing Education for Ministry, 3401 Brook Road, Richmond, Virginia 23227.

The Church Career Development Council, Room 760, 475 Riverside Drive, New York, New York 10027.

PERIODICALS

Atlantic Monthly

Harper's

Human Behavior

Journals & Newsletters of Organizations Listed Above

Psychology Today

Smithsonian

The New York Times (Sunday Edition)

The Wall Street Journal

A FURTHER WORD ABOUT INFORMATION

EACH time that we have finished the Plan for Action part of the process in the leader workshops, several have expressed appreciative curiosity about my knowledge of various resources and how they might relate to specific developmental needs. They have asked that I comment on this ability further in this manual; some have felt that developing this skill would be most difficult for them.

THERE are several ways that I have developed this ability and there are several things I do to keep current and informed on a wide spectrum of developmental happenings. First, the capacity to relate specific events, readings, etc., to developmental needs builds up as one practices the kind of counseling and consultation in which I have been engaged for more than a decade. As one learns more about human development and professional growth, and as clients report back on things tried, one gradually develops a sense of perspective about what "might work" in specific cases. At least, this has been true in my case. Of course, it is all founded on basic studies in personality and occupational development, in which I continue to read and study.

SECOND, I stay fairly well abreast of "happenings" by letting my curiosity fulfill itself in relation to all kinds of things. I read want ads in the local papers, and in such journals as those listed above. I scan brochures as they cross my desk (by the hundreds). I listen to what persons in groups, and individuals in counseling, tell me. I inquire of colleagues about what they have seen or heard. I read book reviews (and books!) and I scan books. Thus do I store up what might seem to be useless bits of information when gathered, but what become very important leads for a particular person to follow in a group next week, or the week after.

I really know of no easy way to develop this capacity, or any quick way, either. It requires a lot of curiosity, quick perusing, extensive study, as well as competent awareness of developmental processes in the human personality. Also, a knowledge of what might "turn ministers on" or turn them off helps!

MORE is said about this in the last section of the Commentary.

COMMENTARY: EXERCISES/PROCEDURES

L. ROLE CLARIFICATION

REFERENCE: PART I, A CLARIFICATION OF ROLES (GREEN) & PART II (YELLOW), PAGE 2

THE entire PLAN BOOK is built around the role clarification process, which is designed to enable one to get a handle on his/her sense of purpose as well as what is required by the nature of the work. It tries to do this in a way which brings a sense of wholeness to function in ministry, so that roles are used as statements of purpose which give reason to the multitudinous functions and tasks one carries out on a day-to-day basis. This edition of the book does a better job with that objective than did the first. However, the whole process of role clarification is so involved with theology and values, with one's own ecclesiology as well as one's own sense of ability and desire, that we have avoided taking the individual into these areas on paper. Concern for them does come out in discussion, however, and the process is meant to allow that to happen.

AT the same time, there is a drive within the materials toward the realistic over against the idealistic. This is not meant to be at the exclusion of the ideal, but rather a push to struggle with the application of the ideal in practical, functional ways, as much as possible, so that ideals have an opportunity to influence the concrete experiences of life as well as the abstract beliefs and values.

THE booklet on roles focuses on distinction between what is intentional and what non-intentional, what is primary and what secondary. The categories are not as clean in real life as they appear on paper,and the overlap between roles is such that a role can be partly intentional in relation to another role, while not intentional in and of itself. Likewise, while the entire role might not be experienced as intentional, specific functions within a role can be intentional. To keep time demand realistic, we have not written into the materials exercises which sort all of this out for the person in preparation, and it does not always get that clearly sorted out in consultation, either, as again time is not available to pursue the topic as far as one might wish to go with it.

WHAT does happen in the role clarification as presently structured is a sense of connection between functions and basic purposes (intentionality) in ministry and a sense of priority about the roles.

THERE are several objectives which these exercises are meant to fulfill. They are to enable the individual to:

1. Realize that in acting out roles one is acting out purpose, that roles have to do with function in a very practical way, that they do not describe status or position or title but rather the purpose of our activities. Thus, we used the durative verb and encourage you to remind participants of that when they start changing the role terms back into nouns. There is a sense of "I am" about roles, of course, and there should be, but in an emphasis on that aspect of role we often lose the importance of what they say about function, about the active bridging they are to enable.

2. Learn a way to define roles, and the importance of doing so. There is no need to insist on the PLAN BOOK definition, but there is advantage for the participant in being urged to write out and check with colleagues his/her own definition of roles. This forces clarity and often brings surprising insight to the individual.

3. See that to practice one role is sometimes to give up the opportunity to practice another--time is finite. This seems to be an important insight for many persons in the process. They express it by saying that they are beginning to be able to accept their own inability to do everything equally well, with equal investment of energy and interest. The sense of priority about roles that develops here is important. However, do not stretch it to absurdity. It is adequate to know that a couple of roles are definitely at the top and a couple are definitely at the bottom, with others in between, without fruitlessly trying to decide between number 1 and 2 or number 7 and 8. The exercise of doing that on paper is useful, in that it forces some discernment upon the person, but consultants need not press for perfect proof that indeed number 1 is number 1 and not really number 2. Discuss it, press sufficiently to stretch one's thinking a bit and then let it go.

4. Obtain greater awareness of what is required by the situation(s) in which he/she plans to minister and what is needed for his/her own fulfillment. In moving toward a statement of "essential roles" we are trying to keep these two needs in tension with one another.

YOU will notice that some roles you consider important to any list of roles are not listed. I have been unable to find any discrete listing which satisfies all. Though good research has been done (particularly by Samuel Blizzard), practitioners will use great energy arguing with definitions and distinctions if the objective is to fit them into a model rather than to teach them how to describe and define their own roles. In the approach taken by the PLAN BOOK, the energy of participant and consultants alike should be used to help the individual clarify and express what he or she means by roles rather than upon defense and explication of a set list. I have found that individuals enjoy and appreciate this approach, and that colleagues are able to assist one another in dynamic ways by following it.

IN my own consultation I have found that investment in the question of intentionality as it relates to roles is well worth the time it takes. It is here that I sometimes begin a persistent asking of WHY questions, trying to help persons see that function without clarity of purpose by a religious leader is playing at religion (which is, after all, a search for, and express of, purpose).

SOME of the WHY questions I ask are:

"WHY emphasize that role instead of this one?" "What does such emphasis have to do with your intention in ministry?" "What is your purpose in ministry?"

"WHY do you insist on overlooking this one?" "What does that mean theologically?" "What values are you expressing--do you want to express?"

"WHY can't you rearrange your ministry to use more energy on ___________________?" "Who is stopping you?" "Who insists that you spend so much energy on _________________when you feel it is contrary to your purpose?"

"WHY can't you shift your priorities?" "With whom must you negotiate?"

OTHER "WHY and WHY NOT" questions come as dialogue develops and in the group situation particularly the participants fall in vitally with this approach. Such questions, when asked by consultants and by colleagues should be asked firmly and directly, but with empathic concern for development of clarity by the respondent. While I do not hesitate to engage in dialogue about my view of ministry when it is appropriate to do so, the purpose of the WHY's must be to help others clarify, not to lay my view of ministry upon them. "WHY?" is an evaluative question which can be asked as a negative judgment or as an encouraging "tell me more" inquiry. It is the latter, of course, which is usually most helpful.

ONCE the WHY questions have been sufficiently pressed, the rest of the process falls into place with relative ease.

THERE is no magic in the 60% guideline given for minimun energy on intentional roles. I have used and found it extremely helpful as a guideline for about eight years. It is based on some industrial studies which show that an upward spiral of effectiveness begins when 60% or greater energy is spent on roles which are meaningful to the executive and a downward spiral begins when the percentage is less than 60%. There is no need, however, to press the matter in a literal fashion. For those who serve in religion it is often reassuring to see that their opportunities for intentionality are as high as they are. There is a tendency, (due, I hypothesize, to the idealism implicit in ministry) to be disgruntled if one is not spending close to 100% of energy on intentional roles. Occupational satisfaction and ministerial effectiveness do not depend upon such a perfect arrangement, however, and effectiveness often involves a willingness to compromise for less than 100%.

AS you work through the role clarification, do challenge extremely long lists of roles. Search for redundancy, look for indications of dilution of energy over too wide an area and for the concomitant refusal to admit an inability to do everything. Generally, eight roles are adequate to describe a ministry and certainly are sufficient for purposes of PLAN BOOK analysis. In cases in which a person feels that it is necessary to list more than eight at the bottom of Page 2, Part II, then ask that only the top eight be used for analysis. Otherwise, the work will become too burdensome for the individual. Teach the process and he or she can extend it later.

M. ABILITIES ANALYSIS

REFERENCE: PART I, AN ANALYSIS OF ABILITY (BROWN) & PART I (YELLOW), PAGE 3

IN the Analysis of Ability booklet, biographical material is sought in some detail and with some breadth. The data developed can be analyzed to confirm or deny the self-evaluation rendered in the other three sections of Part I.

IT is possible, in fact, to build an entire consulting process around ability analysis. History about the use of it in church related career counseling may be instructive here.

IN the early days of Northeast Career Center, searching for a way to evaluate abilities on the basis of life experience so that we would not be dependent solely on projections made from test instruments, I began to use Bernard Haldane's approach to ability analysis as one part of the career evaluation process. (The career center program as a whole was never modeled after the Haldane approach to ability analysis, however, as has been unfortunately claimed.) Haldane emphasizes the evaluation of success experiences, and encourages a deliberate avoidance of failure analysis, an emphasis which supposedly helps people who are "down" to develop a positive attitude toward themselves. His forms and process define success in terms solely of the pleasure principle and use a fairly broad definition of ability which results in a mixture of characteristics and abilities presented as "abilities." He has used the process effectively in the counseling of business persons trying to improve their status and enjoyment in life, and we used the process successfully for several years at the career center, couching it as we did in a context of testing and evaluation by interview. However, it required a great amount of interpretation to our clients, all of whom were church personnel with a definite need to deal with failure as well as with success, and a value need to consider meaning as well as pleasure when analyzing the significance of their life events.

THUS, I developed the Inventory of Meaningful Ability, which provided an opportunity to consider the WHY of life activities and events, including achievement and failure. The IMA came to be widely used by church-related career centers. It includes a discrete list of abilities based on the Dictionary of Occupational Titles published by the United States Department of Labor and used by labor analysts to describe almost every job known to American industry. The instrument had more power for self-insight development than even I was aware when I designed it and it is still used by many career centers. Some career centers which do not use the IMA itself use a very similar format and process they have put together themselves.

ONE of the weaknesses in the IMA, however, as an instrument in general and specifically as one for use in planning for role development within ministry, is its failure to adequately include a concern for process (the ongoing involvements of life) and a too technical approach to the ability factors. Also, there is no effort to discover in failures the abilities in which one found meaning and used well even though the end result was not rated a "success." Failures are confronted and discussed but not searched for abilities.

THE next effort by me, which corrected some of the IMA weaknesses and did focus on church roles rather than work life as a whole, was the Survey of Resources for Development in Ministry. There were two editions of that instrument, which is no longer published, and they led directly to the development of the S.R.D. MIN. PLAN BOOK. Thev were useful and aided many D.MIN. fellows at Drew and Lancaster Seminaries to put together a plan of development based on an understanding of abilities, with some emphasis on knowledge at the very end of the process. What I discovered in using the instrument, however, was that it failed to integrate adequately into the process other very important compponents, which in extended sessions were dealt with directly by me. It put too great an emphasis upon ability analysis, without sufficient attention to the questions of intentionality, role clarification, knowledge and characteristics, which are now approaced in the PLAN BOOK in an integrated way. Also, the ability terminology needed better adaptation to its usage with church roles specifically and that has been done in the PLAN BOOK.

IN this edition of the PLAN BOOK we have revised the process yet again, in response to feedback from those who used the first edition. We now ask for selection of the top five (cf. ten before) significant processes, achievements or failures, and we stop with the simple analysis of those for meaningful effective abilities. This has made this exercise much less burdensome in the at-home preparation and provides adequate data for the purposes of the process.

THE definitions used in this booklet are very important, and this may be overlooked since in the role booklet definitions are used as guides to one's own writing of personal definitions. In ability analysis it is possible and necessary to be much more discrete and definite about definitions. I call your attention, then, to those for significant process, significant achievement and significant failure on Page 1 of the booklet and to the definition of effectively and meaningfully on Page 5.

WHAT is sought in the ability analysis is an awareness of those abilities which when used carry with them in their very use a sense of purposefulness. Effectiveness is also a concern. Seldom does one find meaning in an ability he or she does not use well, but it cannot be assumed that effective use involves meaning in a prima facie fashion. One must struggle with the intersection between the two criteria (effectively and with meaning). Since roles are valuable only if they involve functional activity, it is important to recognize that roles will be fulfilling and effective only if the abilities used in them are themselves so.

IN reviewing and enabling this process with your clients and group participants, the following should assist you:

1. There is no activity in life which does not use in some way one or more of the abilities defined on Pages 6 and 7 of An Analysis of Ability. Some activities are more difficult to analyze than others, and some persons will resist applying this process to certain aspects

of their lives, for reasons of value and because they fail to recognize that to analyze in terms of ability does not mean that the whole story is told--only the ability side of the story. You will meet this resistance most often with respect to such life processes as "marriage," "making love," "relating to other persons," and "playing" (games, sports). In the first three of these, the ability to negotiate is vital whether or not any others are, and a case can easily be made for observe and analyze. In playing games and sports, observing, analyzing and coordinating are essential to even get started.

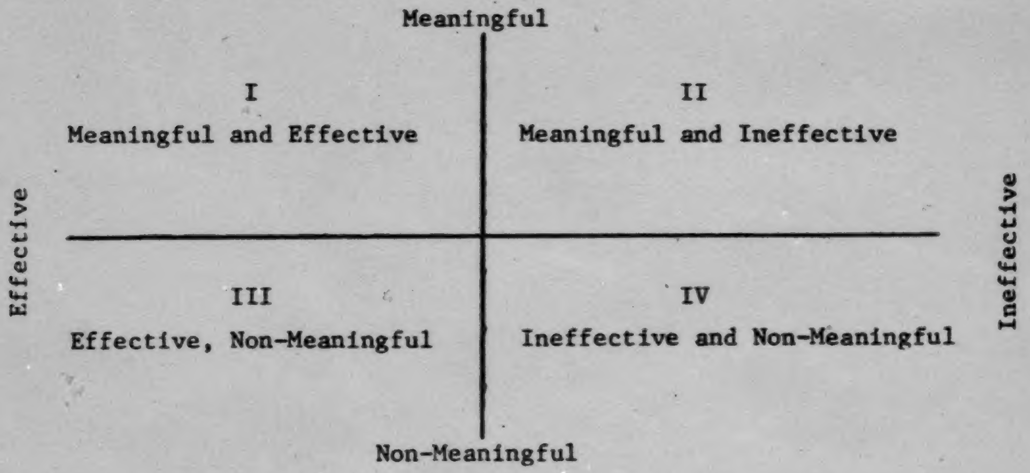
IT is not wise, then, though some counselors do it, to insist that only work and education-related events be used for analyzing abilities. If your only concern is with job effectiveness (or "performance evaluation") such an approach is adequate, but it usually bespeaks a utilitarian, compartmentalized concept of man. In a process which is concerned with the search for meaningful effectiveness, furthermore, it is sometimes in the non-work related events and processes that the most important discoveries are made. Help your participants with the difficult analysis of the seemingly unrelated processes, achievements and failures; they all use abilities and if the person has raised them to consciousness in his or her recollections and has, moreover, then raised them even higher by listing them in the "five most significant" (Page 4), we should hesitate greatly to say that they are not relevant to ability analysis when we know that they can be analyzed.

2. The abilities definitions are important. Be sure that they are used with respect, though occasional slight changes will do no harm. Some discussion will ordinarily uncover any careless usage which is being made of them. Sometimes the error is in the direction of being too literal, an insistence that every single word in the definition be strictly adhered to; other times the error is in the direction of being too broad. (The worst error of this type is with perform which some persons use to mean "do it.")

3. Note that the emphasis is on the whole picture. We have removed all scoring systems because while the numbers that derive from scoring are helpful as signs and clues, they should not ordinarily be used as a conclusive answer, but we have found them more influential than is good.

4. Pay particular attention to the emphases of Item 1, Page 3 of II (yellow). The emphais is on what you did (not "we" but "I" should be the response), on exactly what you did (not just on the results) and on why it was or is so important to "you" (not "them").

IN beginning the consultative review of ability analysis with a group, I usually spend about ten minutes with the whole group discussing the brown booklet in terms of their response to it on a feeling basis. This provides opportunity for recollection of what one has put in his/her own booklet and prepares them for sharing out of it. Next, I ask for a volunteer to share an item from Page 8 (brown) with the group. As he/she shares, following for the most part the outline on Page 3 of II (yellow), I make a few notes on the board. Then, I either have the individual tell us what he/she has "placed in the block" for that item on Page 8, or I have the group discuss what they feel should be in the block in the light of what they have heard the individual say. In either case, this brings about some careful discussion of the definitions on Pages 6 and 7 (brown) and leads to an evaluative awareness of the significance of the meaningful effectiveness criteria. To illustrate that we are trying to obtain for the block on Page 8 only those abilities that meet both criteria, I draw on the board the following graph:


Meaningful
I
Meaningful and Effective
II
Meaningful and Ineffective
Effective
Ineffective
III
Effective, Non-Meaningful
IV
Ineffective and Non-Meaningful
Non-Meaningful

This enables the group to see the relationship between abilities which may have been used but which do not necessarily belong in the block on Page 8. The block on Page 8 is the same as Quadrant I in the above graph.

FOLLOWING this group review, usually done with two persons (one from each quad), the quads sit together and go through the same process with each member of the quad.

N. CHARACTERISTICS SURVEY

REFERENCE: A SURVEY OF CHARACTERISTICS (SALMON), PART II (YELLOW), PAGE 4, AND PART III (CHERRY), PAGE 22

THE objective of the survey is clearly stated in its introduction: to raise awareness of characteristics and their impact, their potential for development and their capacity for inhibiting.

ONE problem for persons trained in personality theory and testing is agreement upon personality variables and their function in relation to various roles. The approach taken to characteristics in the PLAN BOOK is subject to all of the criticisms of any such listing. I can present no brief for it other than my own knowledge of personality and the fact that the list and descriptions presented have proven themselves very useful in helping men and women develop a dynamic understanding of themselves, particularly in relation to ministry roles.

THE PLAN BOOK can be used with or without tests. While tests do add strength, ordinarily, to self-insight development in the process, it is possible, particularly in group settings, to make good use of the Survey of Characteristics without any test data. In such cases, it is important to utilize the resources of the group for reflection about the individual, in order that each might have external feedback against which to compare self-assessment. I have found groups of professional persons, after only a short while together, to be incredibly good at the task of giving feedback to one another when there is a structured process for doing so, such as by use of the characteristics scales provided in the PLAN BOOK. I have found it most effective to take each scale, discuss it with the group, and ask if anyone would like group opinion about himself or herself. Most people do, and after a group of four or more have discussed and reached consensus about a particular individual on a specific scale, it is ordinarily well-received and is often very close to test data.

IF tests are used, then the consultant must, of course, interpret them and assist persons in translating test scores into data that can be compared with the 18 scales. The test I use with the PLAN BOOK is the Sixteen Personality Factors Questionnaire (Institute for Personality and Ability Testing). I encourage participants to compare the test scores to the PLAN BOOK scales as follows:

PLAN BOOK FACTOR	16PF TRAIT
2	B
3	I,M
4	L
5	Q_1
6	QIII
7	G
8	QI
9	QIV
10	Q_2
11	E
12	I
13	H,N

(continued)

PLAN BOOK FACTOR	16PF TRAIT
14	Q_4
15	C,E
16	A,F
17	C
18	O

WE have made major changes in this section of the PLAN BOOK, dropping six scales used in the first edition, and also revising the way in which the characteristics data is used to form developmental objectives.

THE six scales were dropped to save time, in preparation to some extent, but more importantly during the consultative review process. Twenty-four scales were simply too many for most groups to deal with in the time allowed. Decision about which ones to drop was made according to relative significance to development within the ministry roles.

ALSO, we completely revised Part III (cherry) with regard to the treatment of characteristics. The explanation contained in the block on Page 22 of Part III (cherry) probably says sufficiently why we changed this approach. The amount of time and energy put into the earlier approach was for most persons not generative of sufficient insight to justify the investment. What we now have is a way for stating developmental objectives with regard to personality factors. These objectives, stated on Page 22 (cherry), are decided by each individual as he/she considers the insight gained in discussion of the Survey of Characteristics, test and group feedback and relative importance of specific characteristics to specific roles. This is where consultation becomes most important to the individual--consultation with the group leader (or professional person present) and with colleagues.

IT cannot be emphasized too strongly that the PLAN BOOK makes no pretense or attempt to fully diagnose a person in terms of personality. It is trying to assist one in gaining some insight into significant personality data, considering strengths and weaknesses, or enablers and inhibitors, and does not substitute for a complete diagnostic workup in cases requiring such. Keeping this in mind has enabled me to use the PLAN BOOK much more comfortably than at first, beginning with it as I did out of a background of very thorough and comprehensive psychological diagnosis.

ALSO, it cannot be emphasized too strongly that the word used above regarding 16PF scores and the Survey scales is compare. The PF can give some insight about each scale. I cannot and do not wish to claim that scores on the PF numberically mean the same thing as a score on the Survey. In my own group interpretation, I emphasize this again and again. "Use the test for some insight about yourself," I say, "but not as identical with the scale in the book. Remember, you are trying to see what the dynamics are in you, not whether the Survey and the test or group agree, as in some competition for 'rightness'."

THE consultant will need to use his/her knowledge of personality theory to assist in the interpretation of the combined scales and the many nuances possible.

THE important thing to do with this part of the PLAN BOOK is to help persons use it to develop self-insight that can be described and fitted into thoughts about development. It is not essential that all sources of data agree on every characteristic for every person. It is hoped that every individual will be able to distinquish within and to express to others in commonly understood terms the significant dynamic variables of personality, recognize how they influence his/her ministry and plan for development in the light of them.

THIS material is not likely to be very helpful to the person who is seriously dysfunctional emotionally. You will need to refer such persons for professional diagnosis and treatment.

O. KNOWLEDGE INVENTORY

REFERENCE: AN INVENTORY OF KNOWLEDGE (GREY) AND PART II (YELLOW), PAGE 5

PREVIOUS users of the PLAN BOOK will note some significant and clarifying changes in this material. The criteria have been simplified and the consultative review clearly focuses upon evaluation of one's own self-evaluation. This is adequate as a check upon either of the extreme responses to the inventory: overconfidence about knowledge on one end, underconfidence about the other. The objective is to enable each person to look carefully at knowledge (not facts or knowing about alone), and to own a listing of significant areas of knowledge which can be confirmed by colleagues. When the instructions on Page 5 of II (yellow) are followed this is the result. Ordinarily a quad can help each other do this in about one hour.

THERE are many redundancies in the knowledge listings, to allow for the different ways persons have of expressing the same area in different terms. To learn what each of the terms means, the consultant will need to refer to college catalogues, the Encyclopedia of Britannica and other such sources which describe various fields of study and areas of knowledge. Often in professional groups, however, what one person does not know, another will, so there is no need for the group leader to be completely familiar with every term.

P. SUMMARY PROFILE OF SELF

REFERENCE: PART II (YELLOW), PAGE 6

THIS sheet draws together in one place the summary data from each of the other pages in Part II. Its purpose is simply that--to get it all on one page for comparison use later in the process--but in doing the sheet, participants have another opportunity to review what is most significant to them in each category: roles, knowledge, abilities and characteristics. No particular instructions are necessary, other than what are on the sheet, except a reminder that as in doing any part of the PLAN BOOK discernment and reflection are called for. Sometimes, when it is possible, sharing of this sheet with each other is a very confirming experience, but time for that to happen will vary depending on how fast a group works with other parts of the process.

Q. ROLE EFFECTIVENESS PROFILES

REFERENCE: PART III (CHERRY), PAGES 1-19 & PART II (YELLOW), PAGE 2

IN this section, material for determining what a role requires for effectiveness is outlined according to knowledge and abilities. As already indicated, characteristics are dealt with in a different way and are no longer included on the Role Effectiveness Profiles.

THE work required which is to complete a ROLE EFFECTIVENESS PROFILE on each role believed essential (that is, entered at the bottom of Page 2, Part II (yellow), can be done either privately or in the presence of the group. When time allows, there is advantage to this being done while sitting in quads, so that persons can inquire of one another and check with each other about it as they do it. On the other hand, it can be done overnight and checked by the group leader later. I frequently check them over while the quads are doing the knowledge evaluation, or I take them overnight on the second evening, look them over and give them back with any additions or corrections. What I look for is gaps in requirements, in what seems essential to the role given the situation of the person. Once more, perfection is not the objective, but useful, relevant insight.

FOLLOWING the instructions contained on Page 1 (cherry) is adequate. Do call attention to the suggestive nature of the keys, to the need, therefore, to be discerning in the use of them: copying mechanically will not help much, nor will skipping through them hastily give much help. A careful analysis of one's roles, using the keys AS A STARTING POINT, however, will ordinarily provide a great deal of insight about the roles one is practicing or planning to practice.

THIS part of the work should follow completion of Part II (yellow), Page 2 and is so indicated on the suggested schedules.

R. ROLE EFFECTIVENESS EVALUATION

REFERENCE: PART III (CHERRY), PAGES 20-22

AS now written, the ROLE EFFECTIVENESS EVALUATION, which is a comparison of what one has with what one needs, is done in three steps. First, there is a comparison of knowledge required with knowledge possess (Page 20); next a comparison of abilities needed with those one has (Page 21); third is the characteristics development needs sheet already discussed above (C), but due for further consideration here. No key to characteristics is offered in the PLAN BOOK, but each person is encouraged to think in terms of roles to be fulfilled when doing Page 22. Dialogue with the group is often important here.

THIS work can be done while sitting with the group, or privately, depending on preference and the living arrangements of the group.

S. CHECK FOR MEANING

REFERENCE: PART III (CHERRY), PAGE 23

THIS exercise is included as a reminder to all to consider once more the need for meaning as well as for effectiveness. A careful reading of what is written on the page is sufficent. You may wish to read the first two paragraphs out loud before the group begins work on this. It is an invitation to stand back from concern for effectiveness and to think in terms of fulfillment, of purpose, of one's own search for meaning.

T. DEVELOPMENTAL NEEDS SUMMARY

REFERENCE: PART III (CHERRY), PAGE 24

THE thought required for this exercise is a focusing discipline: out of all that has been indicated on the previous pages (20,21,22,23), "What will I choose for developmental attention?" This page becomes the worksheet for setting specific goals and thus is very important. If the process up to this point has worked well for an individual, this exercise comes easy: already a sense of perspective has developed, a feeling for priorities has begun to take shape and this page simply focuses it. If, however, the process has not been clarifying for the participant, this is when you will discover it, if you have not already. The results of this work get shared with the entire group during the last session (see commentary on planning below).

U. DEVELOPMENTAL PLANNING GUIDE

REFERENCE: PART IV (BLUE)

STEP ONE: DETERMINING DEVELOPMENTAL PROCESSES

THE instructions on Page 1 of Part IV call for the completion of a Plan for Action sheet for one year following the first completion of the PLAN BOOK process, preferably beginning immediately. The objective of teaching the process as well as helping make specific plans should again be kept in mind by the leader and group. It is hoped that the individual will follow through with further planning in future years on the basis of the approach learned, and will utilize colleagues and/or professional consultants in checking out his/her own planning.

IN helping to lay out alternatives for working at specific developmental objectives, the consultant's skills as a group leader (in the group programs) and his/her knowledge, information "bank," understanding of human development, and creativity are all important. He or she can either expand and enhance at this point, catalyze a group or an individual, or dampen and impede. I have commented on Page 23 about my own resources for leading this part of the process. There is no way that a manual can give you what you need for this--experience, training, and certain abilities are necessary.

EACH of the process catagories mentioned on Page 1 of Part IV is potentially capable of providing an entire development program within itself, but until the various categories are considered, it is not wise to focus only on any one of them. This is true even if the group is together for the purpose of planning a colleague group program. The colleague group program will have more significance if it is planned and negotiated in the light of everything else the members of the group may try or desire to do as individuals.

IN filling in the process blocks, it is not necessary to place something in every block. Neither is it unusual to use the same process for several different purposes. The objective here is to help persons to be as stimulated as possible about different ways to work at the various developmental needs, but as with other exercises in the PLAN BOOK, to push this to the point of exhaustion is counter-productive.

TIMING is important here. In the three-day program, as indicated on the schedule, I usually allow thirty minutes for the first person, twenty-five for the second, twenty for the third, and fifteen for each of the others. This will vary, dependent upon individual needs, and the group does build up information and skill as it goes through this with each other. It can become very tiring if it does not move fast enough and if a brainstorming attitude does not prevail. Brainstorming means to share without judgment, ranging all over the chart, with an understanding that the group and/or individual will later evaluate and sort out.

IN the three and one-half day schedule, one advantage is a more relaxed time with this part of the process. Not only can more time be given to each person, but the advantage of overnight about halfway through this step is very helpful.

READERS of the first manual will note in the sections which follow a change of expectations with regard to Steps Two and Three of Part IV. We have found that it is better for those to be done at home, after the consultation. I encourage persons to telephone or write me if they have any difficulty or need additional information in doing them. The benefit of standing back for a few days before choosing from the many suggestions made in Step One outweighs, it seems, the advantage of group or consultant input on these last two steps. HOWEVER, encourage that individuals do them SOON.

ALSO, brief mention at the end of the Step One process of which ones make the most sense to the group, or some confirmation of the individuals expressed intent to follow one or another is very helpful.

STEP TWO: SETTING SPECIFIC OBJECTIVES (AFTER CONSULTATION)

WHEN the process categories are as complete as possible, the next step is to choose from them the specific processes to be followed during the coming year. This is most often done at home following the event. In doing this, it is important to note the possibilities of connections between needs, such as, for example, the instance in which an ability and an area of knowledge can be worked on in the same process, although originally the process was assigned only to one of them. An example of this is the case in which "Group Process" is listed under Knowledge, "Negotiating" under Abilities and "Developing Assertiveness" under Characteristics. A process which might deal with all three would be a conflict management training experience, in which there would be specific theoretical input about group process, laboratory experience in negotiating skills and feedback about one's personality, with opportunity to try new behavior.

IN the Step Two section of the worksheet, there is space for four processes to be written in. It is not necessary, of course, to use all four blocks. What is written in should be relevant to the top part of the page and accomplishable during the year. Sometimes only one block will be used, therefore, as the process listed is sufficiently involved to absorb all of the available resources that year.

YOU want to encourage in Step Two, then SPECIFICITY of process, and DATE by which to start, and ABILITY TO ACCOMPLISH it during the year.

STEP THREE: NOTING ROLES TO BE ENHANCED (AFTER CONSULTATION)

THIS step is obviously a "check back and be sure" exercise. It is also a confirming experience. If, upon reviewing the Essential Roles list developed earlier in the process against the plans for the year, one discovers that what is to be pursued has insufficient relevance to roles which need to be developed during that year, then, of course, another run-through of the plans for the year (Step Two) will be necessary. This seldom happens, but when it does, it is significant, for the Developmental Plan for Action MUST have a direct and obvious impact on essential roles if there is to be adequate motivation for follow through on the plan.

V. SUPPLEMENTARY SUMMARY SHEET FOR D.MIN. APPLICANTS

THIS two-page report form appears at the very end of the PLAN BOOK. It is summary, of course, of the PLAN BOOK insights only, since other materials (essays, transcripts, etc.) relevant to application to and planning are submitted separately.

IN completing this summary, the participant will need to refer to already completed analyses in the PLAN BOOK. The PLAN BOOK references are noted on the summary report form. You should call to the attention of the respondent, however, the following:

1. In completing Statement 1, he or she will need to list only the areas of greatest knowledge from Page 6 of Part II (yellow), and will need to list the most meaningful effective abilities and the most significant enhancing characteristics. Note that this may require some further sorting out of the data found on Page 6.

2. In completing Item 2, he or she will utilize Page 24 of Part III (cherry) and will need to choose the knowledge, abilities and characteristics to be worked on in the D.Min. program. This ordinarily would not be everything recorded on Page 24. Also, he/she may wish to include some of the same knowledge, abilities and characteristics mentioned in responding to Statement 1. Ordinarily, there will be some redundancy here, since a D.Min. program at its best will enable a person to enhance strengths as well as develop areas which are weak or inhibiting.

3. In completing Statement 3, he or she should refer to Part II (yellow), Page 2, and consider which roles will be strengthened by work described in Statement 3.

4. Statement 4 goes beyond what has been "programmed into" the PLAN BOOK and will call for further reflection by the applicant. This may be a first statement of possible projects, a restatement of project plans already submitted to a committee,

or a combination. It is an opportunity to call attention to the relevancy of the developmental planning process to project consideration. Some persons with whom I have worked have changed their project plans completely following the PLAN BOOK process; others have had earlier plans confirmed; and others have been enabled for the first time to think of projects which are relevant to their own developmental needs.

SPACE for the supervisor's statement will also vary in importance. You may want to simply write in "NONE," or "See Statement Separately Submitted," dependent on your procedure. I complete the statement in the space provided, Xerox the summary, return a copy to the applicant, keep one for my files and forward the original to the director of D.Min. studies.

IT is probably best that this summary statement be completed by the applicant soon after, but definitely after, completion of the consultative process. Usually, I ask those with whom I work to complete it within a week and forward it to me, so that it is done in the days immediately following completion of the PLAN BOOK.

IT is important that those to whom these reports are submitted understand the PLAN BOOK process on which they are based. This can be facilitated by consultative sessions between you and them, and/or by their participation in a group PLAN BOOK program. I have found that this familiarity enables the results of the PLAN BOOK process to be of continuing use to the fellow and his or her mentors throughout the D.Min. program.

PART I

THE
Survey of Resources for Development in MINistry
PLAN BOOK

a guide for
Surveying Personal Resources & Planning Development
in Ministry

by
Thomas E. Brown

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PREFACE

THE S.R.D. MIN. PLAN BOOK is intended to assist you in shaping a developmental strategy which will result in increased effectiveness and meaning in your ministry. The development of such a strategy is not an easy task; when taken seriously, the energy used in reflection and analysis, meditation and dialogue, is great, but for most it turns out to be a worthwhile investment, leading to new perspectives on the profession of ministry and the intentionality of one's own efforts.

THE *PLAN BOOK* is designed for use in consultation on either a group or individual basis, part of it being completed before such consultation begins and the rest during the consultation. It is also designed to teach you this approach to thought about yourself, so that when you have been through the process once you can continue to apply it to yourself over the years.

GRATEFUL ACKNOWLEDGMENT is due many who have contributed in one way or another to the development of this instrument and the process used with it: the many clients and counselors who have utilized other materials (particularly the *Inventory of Meaningful Ability*) prepared by the author; Wm. Barrick and the D.Min. students and faculty of the seminary at Drew University, who first used and offered helpful criticism of the *S.R.D. MIN.*, a predecessor to this *PLAN BOOK;* Richard Vieth, Loyde Hartley and the D. Min. fellows at Lancaster Seminary who also utilized and offered helpful suggestions about the *S.R.D. Min.;* the men and women in continuing education planning groups related to Lancaster Seminary during 1974; the 30 pastors of Lehigh Valley, who suffered through the first (and very rough) version of the *PLAN BOOK;* the Sisters of the Cenacle, particularly Sr. Rosemary Duncan, for their response to the author's leadership in using the approach outlined in the *PLAN BOOK* in their workshops for the development of personal and ministerial resources; Patricia Allen Brown for special assistance in thinking through the process, the design and format; Barbara F. Ober for patient and expert attention to the details of typing, proofing and printing.

OUTLINE OF THE PLAN BOOK

PART I:	FOUR SECTIONS: Roles Clarification, Knowledge Inventory, Ability Analysis, and Characteristics Survey. This part is done in advance of group or individual consultation.
PART II:	FIVE SECTIONS: Consultative Review of the four sections of Part I and a Summary Profile of Knowledge, Abilities and Characteristics.
PART III:	THREE SECTIONS: Analysis of Role Effectiveness, Comparison of Knowledge, Abilities and Characteristics with Role Requirements, Summary of Developmental Needs.
PART IV:	Outline of a Plan for Development.

A CLARIFICATION OF ROLES

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INTRODUCTION

MINISTRY is carried out in the fulfillment of various roles. A role is a purposeful and task-oriented function, or cluster of functions, which describes one or more of the major responsibilities essential to a particular position. What we consider to be our roles significantly influences how we do our work and how we feel about it. In the living out of roles we use the knowledge, abilities and characteristics which are ours in a variety of ways. They combine to bring the results which give meaning to our efforts and fulfillment to our values, beliefs and commitments.

IT is the objective of this section to help you develop a list of roles which are essential to the effective and meaningful practice of ministry in the setting in which you are now, or intend in the future to practice it. This is an evaluative process calling for careful discernment.

STEP ONE: CHOOSING FUNCTIONAL TERMS AND DEFINITIONS

PAGES 2-7 contain a list of terms which ministers, priests, religious, and other church personnel frequently use to describe the functions of their ministry. The listing comes from many sources and is neither exhaustive nor discrete. It is improbable that anyone would act out all of the functions, on the list and some terms will be more appealing than others to you. It is a *suggestive* list, meant to stimulate you to choose and describe the terms that best express your ministry. This means that you must examine the list, eliminate the terms which are totally irrelevant to you, add terms not covered and change definitions to more suitably fit you. Following these instructions should enable you to develop a list which can be used as a guide to your further development of meaning and effectiveness:

1. Decide the context in which you intend to think through your roles and indicate by marking one of the contexts described at the top of Page 2.

2. Review the list and add any functions, which you do, or should do that are not mentioned in any way. *Write out a definition* for each one.

3. Revise any definitions you need to in order to make a term more suitable for you. *Write your changes in on the lines provided.*

4. In the column "P or S" mark with a "P" all of the functions which you believe to be essential to the effectiveness of your ministry: those which are very basic, which are of PRIMARY importance to your ministry.

5. In the column "P or S" mark with an "S" all of the functions you perceive to be necessary but which are of SECONDARY importance.

6. USE A PENCIL.

ROLE CHOICE LIST

STATEMENT OF CONTEXT: Mark one of these contexts in which you are focusing your consideration of roles:

______ The present situation in which I am carrying out a ministry.

______ A ministry I am planning (or hoping) to move into soon.

NOTE: Some of the terms which follow are similar to job and position titles; in fact, some are identical. Here, however, keep in mind that it is upon functions within positions you are to focus. Do not rewrite definitions to describe entire ministries. *ALSO,* avoid using style indicators, such as *"enabler"* to describe a function. Styles are applicable to many functions rather than being functions in themselves, as a rule.

TERM	P or S	BRIEF DEFINITION
ARBITRATING	–	Peace-making, conflict management functions in an organization, between organizations or persons
BOOK-KEEPING	–	Financial records data entry activities
BUILDINGS MANAGING	–	Oversight of the use and maintenance of buildings and other facilities, including supervision of personnel
CLERKING	–	Doing clerical-type work
COMMUNITY COORDINATING	–	(In *religious communities* or parishes) coordinating various activities and functions of the community

A CLARIFICATION OF ROLES

TERM	P or S	BRIEF DEFINITION
COUNSELING	–	In professional settings and utilizing professional skills, helping individuals with spiritual, family, emotional, vocational, etc., problems
CURRICULUM DESIGNING	–	Preparing study guides, materials, for use in specific ways, either as original work or imaginative use of resource materials provided by others
EDITING	–	Editing, or supervising editing of written materials, filmstrips, audiovisuals.
EDUCATION ADMINISTERING	–	Directing, managing, and/or supervising educational programs or organizations
EVANGELIZING	–	In direct ways, seeking to convert, persuade, recruit, enroll, new commitments to the faith
FOOD SERVING	–	Serving meals, including the preparation of them
FUND RAISING	–	Assuming responsibility for supervising, managing and/or directing efforts to raise money through contributions, wills, special gifts
HOSTESSING	–	Receiving guests, coordinating the usual courtesies extended those who come to a residential facility such as a retreat house or a conference center

TERM	P or S	BRIEF DEFINITION
HOUSE MANAGING	–	Supervising, coordinating, overseeing practical affairs of the house (retreat or conference center)
LEADERSHIP TRAINING	–	Planning for and carrying out, or directing others in doing so, training programs for leaders in the organization
LIBRARY COORDINATING	–	Functioning as librarian, or as library maintenance person, for an organization
MIMEOGRAPHING	–	Setting up and running duplicating equipment
MUSIC LEADING	–	Leading choirs, composing, planning musical programs and such
MUSIC PERFORMING	–	On a regular basis, engaging in public performance in music whether instrumental, vocal, etc.
OFFICE MANAGING	–	Coordinating the affairs of an office in which other persons work
ORGANIZATION ADMINISTERING	–	Managing the organization through oversight, planning, supervision of personnel, budget control, and such
ORGANIZATIONAL CONSULTING	–	Enabling and facilitating organizational life through a consultative counseling type approach

TERM	P or S	BRIEF DEFINITION
PARISH MANAGING	–	Assuming responsibility for the organizational life of the parish by providing leadership, supervision, direction ____________________
PASTORAL CARING	–	Showing specific concern for parishioners whether in a time of special need or on a regular basis, ordinarily in a variety of ways (visiting, counseling, etc.) ____________________
PERSONNEL ADMINISTERING	–	Having responsibility for the administration of personnel policies, including employment arrangements, wages, payroll, etc. ____________________
PREACHING	–	Proclaiming the message vocally, in public settings ____________________
PROFESSIONAL LEADING	–	Leading, or participating with fellow professionals in the community (civic) or church, as in denominational organizations, councils of churches, and such; also providing leadership in various civic and charitable organizations because of position in ministry. ____________________
PROGRAM ADMINISTERING	–	Coordinating, supervising, following through on specific programs within the organization ____________________
PROGRAM DEVELOPING	–	Thinking up, planning, designing, programs of various kinds ____________________
PUBLIC RELATIONS MANAGING	–	Assuming responsibility for getting the news out, perhaps in a promotional way, but also in an informational way ____________________

TERM	P or S	BRIEF DEFINITION
PUBLIC SPEAKING	–	Communicating in formal or semiformal ways and settings through oral presentation ____________________
PURCHASING	–	Coordinating or actually doing the buying of supplies, of whatever kind, on a regular basis ____________________
RECORDS KEEPING	–	Maintaining financial, census, and other records ____________________
RECREATION LEADING	–	Organizing, supervising, planning, and otherwise leading in endeavors of a recreational nature – sports, fun dinners, parties, and such ____________________
RETREAT COORDINATING	–	In a religious community, retreat center, or other setting in which religious retreats are offered on a regular basis, coordinating the scheduling and promotion of them ____________________
RETREAT LEADING	–	Providing guidance, whether on a private or group basis, to retreatants ____________________
SOCIAL WORKING	–	Providing in a somewhat direct way assistance to troubled persons in obtaining tangible help ____________________
SPIRITUAL DIRECTING	–	Providing individuals and groups with specific guidance regarding development of spiritual life and insight ____________________

TERM	**P or S**	**BRIEF DEFINITION**
TEACHING	–	Instructing in semi-formal or formal settings
VISITING	–	Visiting in homes, hospitals, etc.
WRITING	–	Communicating with groups or public through written statements of a formal or somewhat formal nature
WORSHIP LEADING	–	Leading others in formal acts of worship
	–	
	–	
	–	
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STEP TWO: DETERMINING ROLES

YOU have described the functions of your ministry on the previous pages. The task now is to determine which of the terms you have marked are ROLE TERMS for you — terms which describe PURPOSEFUL RESPONSIBILITIES and which organize the functions of work into meaningful clusters. We must distinguish these from the terms which will remain as descriptive of functions within roles.

FOR EXAMPLE, to one person *counseling* may be a role to which many tasks and functions are related; it is the organizing theme of a cluster of activities; to another person *counseling,* as important as it may be, is really a function within the role, *pastoral caring*. For one person *arbitrating* may be a role while for someone else it is one of the functions in the role, *parish managing*.

REVIEW the lists on Pages 2-7 and distinguish for yourself between roles and functions within roles. Do this by listing the roles in the left hand spaces provided below and the functions related to each role in the block on the right. Some functions may relate to more than one role. Try to organize your ministry description into no more than eight roles, but if you need more space add additional sheets.

ROLE	FUNCTIONS IN ROLES
1. ______	
2. ______	
3. ______	
4. ______	
5. ______	
6. ______	
7. ______	
8. ______	

STEP THREE: DISTINGUISHING BETWEEN INTENTIONAL AND NON-INTENTIONAL ROLES

SOMETHING which is intentional for us has a *bridging* impact: it helps us connect who we are inside with the realities we face outside. Our sense of self is involved in that which is intentional: our values and purposes are carried into action through our intentionality.

INTENTIONAL ROLES, thus, are those which are most significant to our sense of satisfaction and meaning: we are not acting them out simply because the job demands them of us but also because, and sometimes *only* because, they are important to our own sense of purpose and being.

IT is important that as much of role functioning as possible be intentional, but it is not often that every role will be intentional. Some roles we must fulfill only because they are important to effective and successful completion of the responsibilities we have assumed. This step encourages you to analyze your list of roles to see which are intentional and which are simply essential.

THERE are four categories into which your roles can be divided following this approach:

I *Intentional and Necessary:* You fulfill purpose in them and effectiveness in the work requires them.

II *Intentional but Not Required:* You do them to fulfill purpose but they are not required by the work.

III *Non-Intentional but Necessary:* The job requires them but you find no purpose of your own for doing them.

IV *Non-Intentional and Not Required:* Neither your own purposefulness nor the job requires them of you.

REVIEW your roles list on Page 8 and place each role in its appropriate quadrant below:

	REQUIRED	NOT REQUIRED
INTENTIONAL	I *Intentional Required Roles*	II *Intentional Voluntary Roles*
NON-INTENTIONAL	III *Non-Intentional but Necessary Roles*	IV *Non-Intentional & Not Required Roles*

STEP FOUR: STATING THE ESSENTIAL ROLES OF YOUR MINISTRY

AT the bottom of Page 9 you have organized your roles into four categories. Review that arrangement and consider which roles are *essential* to your ministry, as follows:

1. If you have listed any roles in Quadrant IV, consider whether you should continue to consider them as part of your role listing. Perhaps they are "tasks" you have somehow drifted into doing but should plan to give up. Perhaps they are not roles but rather functions of roles listed in Quadrants I, II or III. See if you can eliminate any roles in Quadrant IV.

2. Make an "educated guess" about the relative time and energy you spend in each of your roles and summarize your analysis in this chart:

ESTIMATED PERCENTAGE OF TIME/ENERGY USED IN ROLES

I. Intentional Required Roles ____ %
II. Intentional Voluntary Roles ____ %
a. Total % Time Used in Intentional Roles (I + II) ____ %
III. Non-Intentional But Necessary Roles ____ %
IV. Non-Intentional, Not Required Roles ____ %
b. Total % Time Used in Non-Intentional Roles (III + IV) ____ %
Total Ministry, All Roles 100 %

3. Before completing the list below of Essential Roles, review the analysis above and if less than 60% of your time/energy is estimated to be used in Intentional Roles (Line *a*), try to think of ways by which the percentage can be increased. Is it possible to eliminate a role from Quadrant III? If you have not "vacated" Quadrant IV, what percentage would be available for I and II if those in IV were eliminated? Make notes for discussion with others about how you might increase the percentage of your ministry you spend doing roles which are intentional for you. Use the back of this page for such notes, including questions you would like to raise.

4. Summarize here what you now feel to be the essential roles of your ministry: all of those that must be included for meaningful effectiveness, i.e., all that are left in the quadrants at the bottom of Page 9 after you have done the review suggested above.

ESSENTIAL ROLES OF MY MINISTRY

AN ANALYSIS OF ABILITY

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INTRODUCTION

ABILITY, from its Latin root, represents *being able*, having power to do something, having capacity and skill. It is, in a sense, the functional aspect of knowledge. Abilities are the tools which we use in various combinations to act out roles. Often we think of abilities only in terms of our *strength* in them, concerning ourselves only with the question of *being able*. This is appropriate in the light of the root and common use of the word, but it does not give attention in an obvious way to the question of our *desire* to use them: the motivational question. Yet, if the use of abilities in work is to be congruent with our intentions, we must be concerned with the *meaning* we find in using an ability as well as our effectiveness in using it.

THE best way to discover the meaningful abilities which you are able to use effectively is to analyze the significant processes, achievements and failures of your life. In them you will find evidence of *meaningful and effective* abilities which will tell you something about the abilities you should be sure to utilize, since they contribute both to your satisfaction and your effectiveness. In them you will also uncover the abilities which are either meaningless to you or in which you are weak (or both!) so that, if they are important to your work fulfillment, you can plan how to increase effectiveness in them and how to find meaning in their use. Definitions are important in preparing to do such an analysis.

A *SIGNIFICANT PROCESS* is something of a *continuing* nature, which went on for a period of time in the past, or which continues to go on now, and which was (or is) of greater than usual importance to you.

A *SIGNIFICANT ACHIEVEMENT* is something you succeeded in *finishing;* its end result is a major part of its significance to you.

A *SIGNIFICANT FAILURE* is the opposite of a significant achievement. It is of unusual importance to you, and you did not complete it as you hoped or planned, or now wish you had.

STEP ONE: CHOOSING SIGNIFICANT PROCESSES, ACHIEVEMENTS AND FAILURES

ON Pages 2 and 3 space is provided for you to brainstorm about the significant processes, achievements and failures of your life. You may have difficulty at first distinguishing between process and achievement. Study the examples at the top of Page 2 and note the fact that processes may be related to achievements but they are significant solely for the doing of them, not for the end results.

1. On Page 2 try to fill something into each section by brainstorming about your *whole* life, all of the various areas of life: family, education, occupation, ministry, community, leisure-time hobbies and other individual activities. Keep in mind the definitions above and consider your *entire* life span. Do not strain to fill in the failure section; use it only for those failures of greater than usual importance to you.

2

EXAMPLES:

SIGNIFICANT PROCESSES: "attending college," "building model trains," "being retreat director," "coaching the baseball team," "reading Shakespeare," "leading worship," "playing the guitar," "being married," "counseling persons," "writing poetry," "baking cakes."

SIGNIFICANT ACHIEVEMENTS: "graduated from college," "with honors," "conducted 20 retreats," "raised one million dollars for a building," "published an article," "learned how to make pottery," "reorganized the retreat office," "established a new church," "designed a building," "won a sales award," "gained a promotion."

SIGNIFICANT FAILURES: "did not finish master's degree," "failed to get new program off the ground," "was asked to resign," "book turned down for publishing," "failed in a love relationship," "got demoted," "fired for incompetent performance."

BRAINSTORM

SIGNIFICANT PROCESSES:

SIGNIFICANT ACHIEVEMENTS:

SIGNIFICANT FAILURES:

2. On this page, continue the brainstorming begun on Page 2, this time being sure to think back as far as you can, to recollect your *earliest* achievements and earliest significant failure and to remember some of the more significant activities and processes of childhood. Likewise, try to think what some the *latest* (last five years) processes, achievements and failures have been. Do not repeat what you have already listed on Page 2.

SIGNIFICANT PROCESSES:

EARLIEST:

LATEST:

SIGNIFICANT ACHIEVEMENTS:

EARLIEST:

LATEST:

SIGNIFICANT FAILURES:

EARLIEST:

LATEST:

3. Review what you have written on Pages 2 and 3, add any additional process, achievement or failure that comes to mind. Then *from all of those listed in all three categories on both pages* select the five which you feel are the *MOST SIGNIFICANT* for you. Write them into the spaces provided below. Describe each one briefly, indicating why it is (or was) so important to you, what *you* are doing (or did) to bring it about, what you are learning, or did learn from it. Enter them in their order of significance to you.

THE FIVE MOST SIGNIFICANT PROCESSES, ACHIEVEMENTS, FAILURES IN MY LIFE ARE:

1st ______________________________________

2nd ______________________________________

3rd ______________________________________

4th ______________________________________

5th ______________________________________

STEP TWO: DISCOVERING MEANINGFUL/EFFECTIVE ABILITIES

ON Pages 6 and 7 there is a list of ability definitions. The abilities listed might be thought of as *primary* in the sense that they are the very basics, the components out of which more complex abilities are made. This is more true of the data-oriented abilities such as observe and research, than of many of the people-oriented ones, such as negotiate (which include the use of others), but all of the abilities listed are less complex in structure than are most roles. A role is a combination of abilities, knowledge, values and other variables: a primary ability is but one component. One way to think about them is to consider them as the building blocks out of which different houses can be constructed, or, as said earlier, as the tools which are used in varying combinations to complete a task.

THE definitions have been written in accord with *Dictionary of Occupation Titles* (U.S. Department of Labor) definitions, so that they are applicable to all segments of work life in the United States. If, as you use them you adjust the definitions at all, do so conservatively and write in any change you make so that you revise the definition and use the ability term in a consistent way.

1. Review the abilities definitions and familiarize yourself with them in a general way.

2. Transfer to Page 8 [redacted] the five most significant processes, achievements or failures you have listed on Page 4. In the block write in any ability from the abilities list which you feel you used in that process or event with *effectiveness and with meaning.* It is important to apply *both* of the criteria to every ability you consider. If you used it *only* effectively but *without* meaning, *do not* write it in. If you feel you used it *without* effectiveness but with meaning, *do not* write it in.

> *Effectively* signifies that you used the ability in a way that brought results you consider adequate; you used it with some skill. You feel that your peers would also consider your use of it effectively.
>
> *Meaningful* signifies that you used the ability with a sense of purpose, or it contributed to your sense of satisfaction with the process, achievement or failure (though the end result was a failure in your judgment, there was good for you in the use of the ability).

ABILITIES DEFINITIONS

OBSERVE: To see, hear or otherwise compile data through observation of persons, situations, things.

RESEARCH: To compile data through searching into specific sources; these may be literary, laboratory, human populations which are surveyed or interviewed, etc. Research requires the use of observation, though one may observe without doing research.

COPY: To transcribe, enter or post data, as in recording remarks, noting quotations; transferring words or figures from one printed or photographed source to another, whether by manual or mechanical means.

COMPUTE: To perform arithmetical calculations.

CLASSIFY: To arrange data in some systematic way, as in cataloguing, indexing, shelving, numbering, alphabetizing, sorting by color and so on; it frequently is used as an intermediate process between data collection and analysis.

ANALYZE: To examine and evaluate data, sorting through the parts, distinguishing between them, discerning the relationships of the parts to each other and to the whole.

SYNTHESIZE: To relate disparate data in such a way that a whole is formed; the opposite of analyze, it is usually preceded by analysis. *Creative synthesis* occurs when the data which have been analyzed are formed into a new kind of whole.

WRITE: To prepare data in written form, on the basis of analysis or synthesis, or from creative development, in such a way that it can be useful to others (publishing is not essential).

SPEAK: To deliver, in formal or semi-formal fashion, the results of analysis and/or synthesis, for hearing by others; delivery by electronic means is included.

PERFORM: To *publicly* act, speak, sing, play a musical instrument; lead in worship. participate in a panel discussion; and otherwise perform formally or semi-formally.

PERSUADE: To influence others through deliberate efforts whether in writing or speaking, in favor of a product or point of view.

COORDINATE: To determine the time, place and sequence of actions to occur, such as in preparing an agenda for a meeting, arranging a meeting among several persons or groups, scheduling events, developing and/or supervising a production schedule.

ORGANIZE: To bring together persons into groups, whether on a permanent or semi-permanent basis; includes, but does not always involve, the establishment of new organizations.

INSTRUCT: To train others in the techniques and processes related to the use of equipment and other things, without necessary reference to or concern for the underlying principles.

TEACH: To share with others in a knowledgeable way concepts and other analyzed and synthesized data; supervision of the learning process is involved; a part of teaching may be instruction in specific aspects or techniques.

SUPERVISE: To oversee the doing of tasks and functions by other persons, whether employees or volunteers; maintaining harmonious relationships among workers is often involved, as is the giving of positive and negative feed-back.

MANAGE: To lead a group of persons toward the accomplishment of a goal or goals; various styles may be used and the management task may include supervision of the process of selecting goals.

NEGOTIATE: To seek with others the development of common policies or understandings through a process of sharing ideas, information, opinions and/or feelings; efforts at understanding without reaching agreement are considered negotiation.

MENTOR: To deal with persons individually, with a professional concern for the whole person, utilizing professional skills and knowledge, and following ethical considerations, in order to counsel and guide, or otherwise influence them, in regard to spiritual, legal, scientific, psychological, occupational (and such) decisions. Pastoral counseling, marriage counseling, legal consultation all require the use of this ability; teaching usually does, also.

ARTISTIC PRESENTATION: To use the things of *art* (paintings, drawings, sculptures, audio-visuals, collages, banners, displays, etc.) in communication with other persons; sometimes includes the actual creation of the art object.

FINANCE: To raise, or supervise the raising of, funds.

OPERATE OR PLAY: To drive, operate, otherwise use a piece of equipment; the manipulation of a musical instrument is included.

MAINTAIN: To keep, or supervise the keeping of, a building, piece of equipment or other *thing* (not persons or ideas), in useful condition; includes inspection and repair, or supervision of such activities.

COLLECT: To gather together *things* (books, coins, *objets d'art*, antiques, clothing, etc.) for any purpose.

PURCHASE: To buy, or supervise the buying of supplies, equipment, etc.

BUILD: To physically construct, or supervise construction of, things.

DESIGN: To develop basic plans, or create the concept of a building, display, work of art, film, newspaper, or other *thing*.

** Instructions for completing this page are on Page 5 ***

	PROCESS, ACHIEVEMENT OR FAILURE	MEANINGFUL EFFECTIVE ABILITIES
1st		
2nd		
3rd		
4th		
5th		

BELOW, note any questions you have about how this analysis of abilities looks to you. Is anything missing? Are there any surprises? Are you confused about any ability – its meaning for you, your effectiveness in its use, its definition.

A SURVEY OF CHARACTERISTICS

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INTRODUCTION

CHARACTERISTICS are the physical, intellectual and emotional variables which distinguish us as unique persons, influencing how we evaluate and analyze data, as well as how we gather it; our social and world perspectives; our interactions with others; our attitudes toward our being. They influence and are reflected in how we think, feel and behave. They either enhance and enable, or inhibit and disable, our functioning in life.

SOME characteristics are underutilized in the sense that the potential represented by them is not fulfilled. This is sometimes due to other characteristics which inhibit them. Some are helpful in one situation and detrimental in another. Some can be changed and more often than many persons realize, this is the case, but others are not subject to alteration, at least not in substantial ways.

MANY of us are not very aware of the significant characteristics in our own personalities and thus cannot consciously increase the use of them, work toward the correction of those that are inhibiting or plan our work and commitments in terms of our potentials and our needs. It is the objective of this exercise to raise your awareness in this respect through self-reflection, thus preparing you for further insight when the same characteristics are considered for consultative feedback and test input. How they relate to role functioning and professional development will become clear as the process continues toward planning for development.

STEP ONE: MARKING YOURSELF ON SCALES OF OPPOSITES

ON Pages 3-5 eighteen variables are listed in such a way that opposites are at the extremes of each scale. The strengths of the opposites in a person will vary in such a way that in some instances he/she is definitely at the left end of the scale, in others definitely at the right end of the scale. Sometimes, however, the actual characteristic is a mixture of the opposites, perhaps forming a factor that is not truly described by the words used to define the opposites.

AS you study the characteristics, if you feel that you are definitely described by the words at the left, place a dot (•) above one of the first three lines, the first line representing very much this way, the third line representing strongly this way, but bordering on a mixture with the opposite. The same process is followed if you feel that you are definitely described by the words at the right end of the scale, the last line on the scale representing the greatest degree of strength in the characteristic described at the right.

BEFORE turning to the list of characteristics, review the examples and suggestions on Page 2.

EXAMPLES:

25. *FLIPPANT* 1 2 3 / •4 5 6 7 / 8 9 10 *SERIOUS*

This person has placed a dot just inside the middle section so that he/she evidently feels that most of the time the adjective "flippant" is descriptive but not as strongly so as the first three lines would indicate; perhaps he/she is "mostly flippant" or "more often flippant," with some tendency at times to be serious.

25. *FLIPPANT* 1 2 3 / 4 5 6 7 / 8 •9 10 *SERIOUS*

This dot indicates that the person sees himself or herself as "dead serious" almost all, if not all, of the time.

IN trying to settle on where to place your dots, you may find it helpful to keep these suggestions in mind:

a. Consider each scale separately; do not worry about being consistent or whether it makes "sense" to be high on one and low on another. Note the category to which the scale applies (physical, decision making, social focus, interpersonal relations, emotional mood, self attitudes).

b. Think about how you are *most* of the time in *most* situations.

c. Try your best to place the dot to indicate where you are *now* on the scale, not where you would like to be or were at one time.

d. Be as spontaneous as you can, placing yourself quickly on each scale.

e. Try to avoid attaching stereotypic loads to the words at the left and right of the scales. Note the brief definition given and do not add too much to it from "common understandings." The words chosen have been so as much as possible according to correct usage in the English language but many have more than one meaning.

f. Remember that this is for your eyes only unless you choose to share it with someone else: be as honest with yourself as you can, both in taking credit for your strengths and admitting to some of your inhibitors or liabilities.

g. Place your dot somewhere between the fourth and seventh spaces if you feel that neither extreme accurately describes you.

USE A PENCIL

MARK each scale according to the instructions on Pages 1 and 2.

DEFINITE ← *MIXED* ↔ *DEFINITE* →

___ ___ ___ / ___ ___ ___ ___ / ___ ___ ___

PHYSICAL FACTOR

1. *ENERGETIC* 1 2 3 / 4 5 6 7 / 8 9 10 *ENERVATED*

Having extra physical energy; moves fast and with vigor

Tired, feeling as though the "juice" is gone

INTELLECTUAL, EVALUATING, PLANNING & DECISION-MAKING FACTORS

2. *INTELLECTUALLY SLUGGISH* *INTELLECTUALLY AGILE*

1 2 3 / 4 5 6 7 / 8 9 10

Finds abstract data difficult to handle, wants most things placed on simple or concrete basis

High intellectual power with facile mind, handling abstract data with ease and flexibility

3. *RATIONAL* 1 2 3 / 4 5 6 7 / 8 9 10 *EMOTIONAL*

Objective logic with emphasis on facts as guide to decisions

Subjective concern, with intuitive-emotional approach to decisions

4. *OPEN-MINDED* 1 2 3 / 4 5 6 7 / 8 9 10 *EVALUATIVE*

"Unshielded," trusting, often taking ideas at face value

Evaluative, protective of own ideas, defends against challenges to beliefs, ideas

5. *CONSERVING* 1 2 3 / 4 5 6 7 / 8 9 10 *PIONEERING*

Tends to begin with what is, or has been; tradition more valuable than contemporary

Places high value on new experience and enjoys experimentation, looks for ways to change tradition

6. *ACHIEVEMENT-ORIENTED* *PROCESS-ORIENTED*

1 2 3 / 4 5 6 7 / 8 9 10

Completion of the task is more valued than the process, wants results

More concerned with procedure and interactions than with results or conclusion

7. *RULE-FREE* 1 2 3 / 4 5 6 7 / 8 9 10 *RULE-BOUND*

Tends to judge according to the situation, may be expedient and utilitarian

Tends to be scrupulous and rule conscious, careful in most things, conscientious

SOCIAL OR WORLD FOCUS/ORIENTATION

8. *EXTRAVERSIVE* *INTROVERSIVE*

1 2 3 / 4 5 6 7 / 8 9 10

Focuses on the external world first, relates ideas and feelings to that which is outside the self

Focuses on internal first, with tendency to relate ideas and feelings to self before projecting outward

9. *ADJUSTMENT-ORIENTED* *POWER-ORIENTED*

1 2 3 / 4 5 6 7 / 8 9 10

Concerned with adapting to the world rather than controlling, a follower

Seeks leadership and is appreciative of status and authority

INTERPERSONAL RELATIONS FACTORS

10. *INDEPENDENT* *GROUP-DEPENDENT*

1 2 3 / 4 5 6 7 / 8 9 10

Would rather work alone or with few persons, feels self-sufficient

Needs other persons around, is dependent on group involvement, may feel insufficient alone

11. *PASSIVE* 1 2 3 / 4 5 6 7 / 8 9 10 *DOMINANT*

Tends to follow others and seldom leads or competes for control

Tends to assume role of leader, or competes for control with others

12. *HARD* 1 2 3 / 4 5 6 7 / 8 9 10 *INDULGENT*

Not influenced by sentiment, can be hard and cynical, tough

Hesitant to be direct, valuing kindness toward self and others more than "tough honesty," tender

13. *SPONTANEOUS* 1 2 3 / 4 5 6 7 / 8 9 10 *ANALYTICAL*

Open, impulsive, forthright in relationships; may be naive

Agenda-conscious, seldom caught off guard, analyzes before speaking, "sophisticated"

EMOTIONAL MOOD AND TONE FACTORS

14. *TRANQUIL* — *UPTIGHT*

__1__ __2__ __3__ / __4__ __5__ __6__ __7__ / __8__ __9__ __10__

Calm, easy-going, relaxed, takes it as it happens, low anxiety	Feels frustrated, tense, driven by anxiety

15. *TENTATIVE* — *TENACIOUS*

__1__ __2__ __3__ / __4__ __5__ __6__ __7__ / __8__ __9__ __10__

May throw in the towel easily, be apathetic, or easily defeated	"Hangs in there," may be hard to stop, even when logic indicates the wisdom of doing so

16. *STOICAL* — *ENTHUSIASTIC*

__1__ __2__ __3__ / __4__ __5__ __6__ __7__ / __8__ __9__ __10__

Quiet, serious, critical, not easily excited about most things in life	Impulsively excitable and "turned on" by much, wants others to be so, too

ATTITUDES TOWARDS THE SELF/SELF-AWARENESS

17. *SELF-QUESTING* — *SELF-POSITING*

__1__ __2__ __3__ / __4__ __5__ __6__ __7__ / __8__ __9__ __10__

Doubts the significance of own self, low "ego strength," saying "I" is difficult	Has high "ego strength," no trouble starting with self as the base; sees self as real

18. *SELF-APPROVING* — *SELF-CENSURING*

__1__ __2__ __3__ / __4__ __5__ __6__ __7__ / __8__ __9__ __10__

Feels worthy, does not carry much guilt, faces life with sense of assurance	Feels unworthy, tends to be apprehensive about life; unresolved guilt a burden

STEP TWO: DEVELOPING A SUMMARY SELF-DESCRIPTION

REVIEW each factor on Pages 3-5 and try to think of one word or two, adjectives preferably, which describe(s) that characteristic in you. You may want to use the words listed; do so if they are suitable, but you will need especially on those scales which are marked in the middle to develop your own words or words. For example, suppose you have placed a dot over the seventh line in Scale 5: you might simply say that you are "Somewhat pioneering" or you might feel that the pioneering drive within yourself is inventive and choose to call yourself "inventive." Do this sort of reflection on each scale and write in below words with which you are most comfortable, or which at least seem most appropriate at this time.

CHARACTERISTICS

1. ____________________ 10. ____________________

2. ____________________ 11. ____________________

3. ____________________ 12. ____________________

4. ____________________ 13. ____________________

5 ____________________ 14. ____________________

6. ____________________ 15. ____________________

7. ____________________ 16. ____________________

8. ____________________ 17. ____________________

9. ____________________ 18. ____________________

NOTE here the numbers of the scales about which you are *most confused*, least sure of what that characteristic means for your own behavior; *most concerned*, aware of problems the characteristic causes you at times:

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AN INVENTORY OF KNOWLEDGE

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INTRODUCTION

KNOWLEDGE has to do with what we understand, are aware of and know how to use, as a result of information and techniques acquired by study. We usually think of knowledge as that which is learned through formal study, as in academic environments, but we need not and should not limit ourselves to that perception. Knowledge is also gained through informal "along the way" study and experience. When considering, however, whether we "have knowledge" in an area or merely a scattering of bits and pieces of data acquired in the process of living, it is important to remember a primary reason we may limit our perspectives to academic and formal settings. We are aware that in the more formal settings, particularly in the academic, a conceptualization occurs, a putting together of the practical and the theoretical, an integration of parts into a whole. This organization of "data" into "knowledge" is difficult to achieve informally. This tendency recognizes that, however gained, *to have knowledge in an area is to possess a mastery of the principles and technical data relevant to the field.* In fields such as music, for the performer, the skill related to the use of principles and techniques is an essential part of the knowledge. In others (e.g., psychology) one can have very useful knowledge without skills being essential.

AN inventory of knowledge is important in developmental planning for ministry because most roles in ministry are vacuous if they are understood and lived out solely in technocratic ways. The objective of this section, therefore, is to assist you in doing an inventory of the knowledge you have in order that evaluation of role fulfillment and effectiveness can include consideration of knowledge you have and want to use, as well as knowledge you may need to develop.

STEP ONE: REVIEWING YOUR AREAS OF KNOWLEDGE

1. Complete on Page 2 a listing of your efforts to develop knowledge through formal work towards academic degrees, formal continuing education events and private study.

2. On Pages 3-8, indicate your own opinion about areas of knowledge mastered by you both in situations mentioned on Page 2 and in other life experiences, (e.g., work, family, community) following the instructions given on Page 3.

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A. FORMAL DEGREE STUDIES

DATES (From-To)	INSTITUTION	MAJOR FOCUS	MINOR FOCUS	DEGREE RECEIVED

B. FORMAL CONTINUING EDUCATION STUDIES

DATES (Year)	INSTITUTION OR SPONSOR	MAJOR FOCUS	MINOR FOCUS	CERTIFICATE (✓ = yes)

C. PRIVATE STUDIES OF CONSISTENT NATURE

NUMBER OF MONTHS OR YEARS PURSUED	FOCUS OF CONCENTRATED EFFORT

FIELDS OF STUDY LIST

THE fields of study outlined below and on the following pages have been selected from listings contained in various college, university and seminary catalogues, continuing education bulletins, and manuals describing short-term course and event offerings by organizations concerned with specific areas (such as human relations, management, teacher education). They have been deliberately grouped only in rough alphabetical format so that each will be considered individually and not in "lot fashion." This inventory is long and comprehensive, but by no means complete. Provision is made on Page 8 for you to add fields relevant to you for which you can find no suitable expression in the list.

STEP ONE

GO through the list and, applying the criteria below, CIRCLE each FIELD OF STUDY in which you believe you have SIGNIFICANT KNOWLEDGE. Consider that your knowledge is significant, IF:

1. You are relatively *current* with regard to *theory* and *practice*. you are up-to-date on writing in the field, aware of current trends and would be able to criticize your own theory and practice in the light of other thought in the field.
2. You could "hold your own" with your peers in a discussion.
3. You are aware of what you *do not know* (specifically, e.g., awareness of a new trend but unfamiliar with the details).
4. You maintain a *regular interest* in the field.

The number of fields most persons will circle when these criteria are strictly applied will be small when compared to the length of the list. Also, note the redundancies in the list; they provide for the differing ways the same area of knowledge is described.

FIELDS OF STUDY

Abnormal Psychology
Accounting
Administrative Role Theory
American History
American Indian Culture
American Sub-Cultures
American Literature
American Government
American Religious Experience
Ancient History
Anthropology
Arbitration Theory and Practice
Archaeology
Architecture
Art Appreciation
Art History
Art Methods
Asian -- Religious
Augustinian Theology
Biblical Archaeology

Biblical Hebrew
Biblical Literature
Behavior Modification
Behavior Theory
Biology
Budget Analysis
Budget Planning
Care of the Ill
Career Development
Child Development
Church and Culture
Church Polity
Change Agentry
Christian Ethics
City Planning
Classics
Clinical Psychology
Cost Analysis
Communications Theory/Practice
Community Culture
Community Mental Health
Computer Applications
Contemporary Roman Catholic Theology
Contemporary Symbol Systems
Confirmation Education
Content Analysis
Counseling Theory
Counseling Techniques
Criminal Behavior
Criminal Justice
Curriculum Analysis
Curriculum Development
Cybernetics
Doctrine of Christ
Doctrine of God
Doctrine of Holy Spirit
Doctrine of Church
Doctrine of Man
Doctrine of Ministry
Doctrine of Evil
Doctrine of Salvation
Doctrine of Sacraments
Data Collection and Analysis
Decision Theory
Demography
Developmental Psychology
Early Christianity
Eastern Philosophy
Eastern Religions
Ecology
Economics Theory
Ecumenics
Educational Administration
Educational Psychology

- English Bible
- English Literature
- Ethnic Groups
- Evolution
- Exegetical Process
- Existentialism
- Family Counseling
- Folk Culture
- Folk Drama
- Folk Music
- Folk Religion
- French
- Freudian Psychology
- German
- Gestalt Psychology
- Genetics
- Government
  - Local
  - National
- Greek
- Greek History
- Greek New Testament
- Greek Psychology
- Group Conflict Management
- Group Process
- Group Therapy
- Health Care
- Hebrew
- Hebrew Bible
- Helping Philosophy
- Historical Method
- History of
  - Christianity
  - Christian Ethics
  - Church
  - Evangelism
  - Ministry
  - Family
  - Israel
  - Religions
  - Third World
  - Women
- Housing Theory
- Home Management
- Homiletics
- Hospital Ministry
- Humanism
- Industrial Sociology
- Information Systems
- Instructional Media
- Interpersonal Communications
- Intervention Theory
- Investments
- Jewish Religion
- Journalism
- Judaism
- Jungian Psychology
- Kinship Theories
- Latin
- Labor Relations
- Language and Culture
- Law
- Land Use Policy
- Leadership Motivation
- Leadership Training
- Learning Theory
- Life of Jesus
- Life Span Psychology
- Linguistics
- Literary Analysis
- Liturgics

- Management Theory/Practice
- Manpower Analysis
- Marriage Counseling
- Marketing Theory
- Mass Media
- Mathematics
- Measurement and Evaluation
- Migration (Human)
- Ministry to
  - Adults
  - Youth
  - Children
  - Elderly
  - Ill
- Moral Theology
- Music Performance
- Music Theory
- Music Teaching
- Mysticism
- Negotiation Theory/Techniques
- Nonverbal Communication
- Nursing Theory and Practice
- New Testament Interpretation
- New Testament Theology
- Old Testament Interpretation
- Operations Analysis
- Organizational Development
- Organizational Diagnosis
- Organizational Ecology
- Organizational Psychology
- Parish Administration
- Parish Development
- Pastoral Psychology
- Pastoral Theology
- Patristics
- Penology
- Personality Theory
- Personnel Administration
- Person and Society
- Philosophical Theology
- Philosophical Analysis
- Preaching Theory/Practice
- Prophets
- Program Evaluation & Planning Theory
- Planning Theory/Practice
- Poetic Expression
- Poverty
- Politics of Reform
- Political Science
- Primitive Religions
- Problem Solving Theory
- Programmed Instruction
- Project Management
- Psychology, General
- Psychology of
  - Aging
  - Communications
  - Creativity
  - Exceptional Children
- Psychology of
  - Religious Experience
  - Occupations
  - Perception
- Psychotherapeutic Theory and Practice

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- Public Administration
- Public Relations
- Purchasing Practices
- Reality Therapy
- Reformation Theology
- Regional Planning
- Recreation Administration
- Religion and Art
- Religious Anthropology
- Religious Leadership
- Religious Organizations
- Research Methods
- Rogerian Psychology
- Roman History
- Rural Church
- School Administration
- Science and Religion
- Scientific Revolution
- Secularism
- Sects & Cults
- Sex Education
- Sex Roles
- Social Change
- Sociology of
  - Crime
  - Disadvantaged
  - Family
  - Knowledge
  - Language
  - Mass Communications
  - Ministry
  - Morality
  - Religion
  - Occupations
  - Organizations
  - Science
  - Technology
- Social Movements
- Social Psychology
- Social Research Method
- Social Welfare Policy
- Speech Theory and Technique
- Speech Therapy
- Spiritual Discipline
- Systematic Theology
- Systems Theology
- Teaching Theory
- Teaching Method
- Technology & Religion
- Technology and Culture
- Television Production
- Thanatology
- Theological Process
- Theory/Practice of Christian Education
- Thinking Process
- Tragedy (Classic)
- Tragedy (Modern)
- Transactional Analysis
- Urban Anthropology
- Urban Development
- Urban Religion
- Values Clarification
- Values Theory
- Values in Education
- Western Culture
- Western Religions
- Wage & Salary Administration
- Welfare Administration
- Writing (Creative)
- Worship

Welfare Counseling	World Missions	Women and Religion

STEP TWO: SUMMARIZING YOUR AREAS OF KNOWLEDGE

Review the *Fields of Study List,* be sure you have applied the criteria on Page 3 and write in below all of those areas which you believe to be:

AREAS OF SIGNIFICANT KNOWLEDGE

THE S.R.D. MIN. PLAN BOOK

PART II

THE INDIVIDUAL'S GUIDE TO CONSULTATION

P
A
R
T

II

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INTRODUCTION

THIS PART of the *S.R.D.MIN. Plan Book* is intended as a help in the group of private consultative process which should follow the completion of Part I. It is best that self-evaluation precede this feed-in and feed-back experience so that you begin your approach to planning as a *personal* responsibility. The danger of becoming an other-directed person is very great in modern church life and is often increased by evaluative procedures which begin with external assessment rather than with the internal. While professional persons in the church should be open to guidance from others and to reflection about themselves in the light of test data and feed-back from colleagues and consultants, it remains their responsibility to try to integrate this into perspectives which are finally their own. This Part and the Parts which follow, therefore, are designed to assist you in developing an integrated perspective about yourself, not simply to aid in the collection of data from various sources.

IN receiving information about yourself from tests, consultants, colleagues, laypersons and others, it is important to be open to the *positive* in-put as well as to the negative. An effort to deny the real strengths that we have, as a function of self-denial or humility, is not conducive to the development of potential and can be as much an escape from responsibility as an expression of true humility. A self which is not known cannot be given as freely to ministry as one which is known in terms both of strength and weakness.

AS you work through the rest of the *Plan Book*, then, you will be challenged and confronted by both positive and negative in-put about yourself. Try to keep this in perspective by accepting it all as data about a dynamic human person, one in whom the Creative Spirit is working and one for whom life is a process of discovery: an uncovering of the personal richness that is at the depth of being. In the search you will see some things that are like gold: accept them as such; you will also see some things that are disturbing because they do not shine. These may require additional refining, or they may be of such a nature that they have to be accepted as they are: they may not be refinable. Accept them too, as part of the total self.

The Consultative Guides of Part II parallel the sections of Part I. Page 6 provides a way to summarize a description of yourself based on each of the review guides. The word "consultants" as used in the guides refers to peers, as well as to professional persons, with whom you may consult as part of the process.

CONSULTATIVE REVIEW OF ROLE CLARIFICATION

ALL PAGE NUMBERS BELOW REFER TO "A CLARIFICATION OF ROLES"

1. ON Page 10 you indicated in the last item (4) what you believed your essential roles to be after the analysis you had done the clarification exercise. Reconsider that listing now by reviewing it with your consultant (s). Be sure to consider:

A. *YOUR classification of the roles in the Quadrants on Page 9.*
- Share your questions and doubts.
- Explain your arrangement.
- Seek help in "vacating" Quadrant IV if you were unable to do so earlier.

B. *THE completeness of your listing.*
- Are all requirements of your ministry covered?
- Have you adequately considered needs of laity?
- Have your own needs been adequately considered?

C. *THE possibility of redundancy in the listing.*
- Are all terms used representative of distinctive roles?
- Is any term used really, on second thought, a function of another role rather than a role itself?
- Is any term in Quadrant III representative of a role that should be in Quadrant IV (and thus not essential)?

D. *THE accuracy of your time analysis.*
- Did you think through a typical week?
- How would you adjust the analysis in light of this discussion?
- Can you arrange to spend at least 60% of your time and energy in Intentional Roles?

2. MAKE any changes necessary and restate your listing of essential roles, in order of their significance to your meaningful effective ministry, below. State the *most essential* role first, and so on.

THE ESSENTIAL ROLES OF MY MINISTRY, PRIORITIZED

1. ______________________ 5. ______________________

2. ______________________ 6. ______________________

3. ______________________ 7. ______________________

4. ______________________ 8. ______________________

CONSULTATIVE REVIEW OF ABILITY ANALYSIS

ALL PAGE NUMBERS MENTIONED BELOW REFER TO "AN ANALYSIS OF ABILITY"

ON Page 8, you analyzed the five most significant processes, achievements and/or failures for the abilities you used in them which were both meaningful *and* effective. By reviewing your analysis with your consultant(s) you should be able to further clarify the abilities which you use with greatest effectiveness and in which you find meaning.

1. EXAMINE the experiences listed on Page 8 and choose one to discuss in detail.
    - ✓ TELL what you did or are doing. Be as PRECISE and as SPECIFIC as you can: speak of *yourself*. If others were involved, distinguish your activities from theirs.
    - ✓ TELL why it is or was so important to you. Why is it one of the most significant experiences in your life?
    - ✓ REVIEW the abilities you placed in the block for it on Page 8. Make any changes you need to in the light of this discussion.
2. IF time permits repeat the above process with another of the significant experiences mentioned on Page 8.
3. NOW, after the discussion encouraged above, EXAMINE the blocks by each of the items on Page 8 and be sure that
    - ✓ EVERY ability listed was used *effectively* and did have *meaning* for you. Erase any which do not meet the *meaningful effective* definition.
    - ✓ ADD any abilities which you overlooked before. Again, apply the *meaningful effective* standard.
4. IN the space provided below list your *meaningful effective abilities* in order of their apparent strength. To do this examine the blocks on Page 8 and note which abilities are mentioned most frequently. REVIEW your listing with your consultant(s).

MY MEANINGFUL EFFECTIVE ABILITIES ARE

CONSULTATIVE REVIEW OF CHARACTERISTICS

ALL PAGE NUMBERS MENTIONED BELOW REFER TO "A SURVEY OF CHARACTERISTICS"

IN completing the Survey of Characteristics you marked yourself on each of eighteen scales and then summarized your view of yourself on Page 6 of the survey. It is important that you review that self description with others, as follows:

FIRST, discuss with your consultant(s) any of the individual scales about which you have questions, regarding either the meaning of the terms used or where you see yourself on the scale. ASK the persons with whom you are consulting where they see you on the scale. Use a vertical line ___I___ to mark where the consultant(s) see you.

SECOND, if tests are used in your consultation, follow the instructions of the test interpreter with respect to what the tests indicate about each scale. Tests will not render scores which are indicative of *exactly* the same as the score marks on the survey scales, but they can be used for much insight about the meaning of the scale for you. Use a circle ___O___ to indicate where you think the test places you on each scale.

THIRD, reconsider each of the scales in the light of the above information (group or consultant feed-back and test data) and mark where you now see yourself on each scale by bracketing the space, like this: [______] .

FOURTH, now summarize below what you believe to be the MOST SIGNIFICANT CHARACTERISTICS of your personality in terms of *enablers* (those which are strengths, which serve you well in most life situations, particularly in the roles of ministry.

FIFTH, in like manner, summarize below what you believe to be the MOST SIGNIFICANT CHARACTERISTICS of your personality in terms of *inhibitors* (or *disablers* – they inhibit you in the fulfilling of your purposes in work and probably elsewhere also. Some characteristics may be both enablers and inhibitors and thus should be listed in both columns.

THE MOST SIGNIFICANT CHARACTERISTICS OF MY PERSONALITY

ENABLERS	*INHIBITORS*

CONSULTATIVE REVIEW OF KNOWLEDGE INVENTORY

ALL PAGE NUMBERS BELOW REFER TO "AN INVENTORY OF KNOWLEDGE"

1. OBJECTIVE: TO evaluate your evaluation of your areas of significant knowledge.

   A REVIEW with your consultant(s) how you applied the criteria on Page 3 to the fields of study listed on Pages 3-7.

   * Were you overly strict in applying them?
   * Were you overly lax in their application?

   B RECONSIDER your list with INTEREST in mind:

   * If you have listed a field in which you have only occasional interest, it should probably be eliminated.

   C CONSIDER: If asked, are you willing to be "tested" by your colleagues in any field which you have listed as an area of significant knowledge?

   D ARE there areas of knowledge you have, which qualify as significant areas for you but which you failed to note?

2. RECONSTRUCT here your listing from Page 8, in the light of the discussion suggested above and your own further thought. This-time write your AREAS OF SIGNIFICANT KNOWLEDGE down in *the order of their strength.* (1 = strongest area).

AREAS OF SIGNIFICANT KNOWLEDGE

1. ______________________
2. ______________________
3. ______________________
4. ______________________
5. ______________________
6. ______________________
7. ______________________
8. ______________________
9. ______________________
10. ______________________
11. ______________________
12. ______________________
13. ______________________
14. ______________________
15. ______________________
16. ______________________

A SUMMARY PROFILE OF SELF

ON Pages 2, 3, 4 and 5 you have summarized the insight gained through a consultative review about the essential roles of your ministry, the meaningful effective abilities you have, the characteristics which make up your personality and the significant knowledge areas you have developed. Summarize those insights below. (All Page numbers refer to this part.)

THE ESSENTIAL ROLES of my ministry are (see Page 2, Item 2):

____________________ ____________________

____________________ ____________________

____________________ ____________________

____________________ ____________________

TO THESE ROLES I BRING THE FOLLOWING:

AREAS OF SIGNIFICANT KNOWLEDGE (Page 5, Item 2)	*MEANINGFUL/EFFECTIVE ABILITIES* (Page 3, Item 4)	*MOST SIGNIFICANT CHARACTERISTICS* (Page 4)
		ENABLING
		INHIBITING

THE S.R.D. MIN. PLAN BOOK

PART III

ROLE EFFECTIVENESS ANALYSIS

STEP ONE: DEVELOPING PROFILES FOR ROLE EFFECTIVENESS
STEP TWO: ROLE EFFECTIVENESS EVALUATION FOR KNOWLEDGE
STEP THREE: ROLE EFFECTIVENESS EVALUATION FOR ABILITIES
STEP FOUR: ROLE EFFECTIVENESS EVALUATION FOR CHARACTERISTICS
STEP FIVE: CHECK FOR MEANING
STEP SIX: PRIORITY SUMMARY OF DEVELOPMENTAL NEEDS

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STEP ONE

DEVELOPING PROFILES FOR ROLE EFFECTIVENESS

YOU have stated on Page 2 of THE INDIVIDUAL'S GUIDE TO CONSULTATION (Part II of THE S.R.D.MIN. PLAN BOOK) what you believe to be the essential roles for the meaningful/effective practice of your ministry. The next task is to analyze each of those roles to determine what areas of knowledge and abilities are most likely to contribute to effectiveness in each of those roles.

1. Look over the two keys to role effectiveness which follow on Page 2-10. Do not be overwhelmed by these keys. Since it is necessary to provide an analysis of all the roles which are described in Part I of the Plan Book, they look rather weighty and tiring at first glance. You actually will be examining in detail only the references in each key to the roles you are planning to practice. Study the keys now in order to familiarize yourself with the approach taken, to "get a feeling" for it.

2. Remove from this part the ROLE EFFECTIVENESS PROFILE sheets (Pages 12-19). Turn to Item 3 on Page 2 of Part II and, referring also to the *role definitions* found on Pages 2-7 of A CLARIFICATION OF ROLES, begin a profile sheet for each role you intend to practice by filling in the *role term* and your definition of it.

3. Next, consider the particular situation(s) in which you will be practicing each role and note in the space provided on the profile sheet any unique *situational factors* which should be remembered when analyzing the effectiveness requirements of the role. (For instance, the role of "Parish Managing," for an assistant minister who does it as a major part of the job in a large congregation, is much different than it is for a pastor of a small congregation who spends less than 5% of the time on parish management functions.)

4. Next, complete each profile: (1) Find the role on each of the keys provided in this section, also referring to the *Fields of Study* list (AN INVENTORY OF KNOWLEDGE) and the *Abilities Definitions* (AN ANALYSIS OF ABILITY). (2) Determine what areas of knowledge and which abilities apply, noting them in the columns provided on each profile sheet.

5. Review what you have placed in each column with your consultant(s). Revise each column according to insights gained in such a review.

6. When you are satisfied that the Role Effectiveness Profile for each role is complete, proceed with Step Two, which begins on Page 20.

KEY TO KNOWLEDGE ANALYSIS
OF ROLES

ALMOST all of the roles described in A CLARIFICATION OF ROLES (Part I, THE S.R.D. MIN. PLAN BOOK) are analyzed below according to the areas of knowledge which may contribute most to functioning in them. The areas of knowledge are taken from the Fields of Study list contained in AN INVENTORY OF KNOWLEDGE (Part I of the PLAN BOOK).

IT should not be assumed that every single area of knowledge relevant to a role is indicated. There may be others that you, your colleagues, or your consultant will want to add to those mentioned. Also, when particular situations and individual style approach are considered there are probably areas indicated which are not essential. There is an effort to be as comprehensive as possible in order to stimulate your thinking about the various areas of knowledge that might contribute to role functioning. You must use your judgment and that of your colleagues in selecting which areas are most relevant to your roles.

ROLE TERM	AREAS OF KNOWLEDGE WHICH MAY CONTRIBUTE MOST TO THE ROLE
ARBITRATING	Arbitration Theory/Practice, Behavior Theory, Change Agentry, Data Analysis, Conflict Management, Group Process, Interpersonal Communication, Intervention Theory, Negotiation Theory/Practice, Problem Solving Theory, Social Psychology
BUILDINGS MANAGING	Budget Planning, Home Management, Labor Relations, Management Techniques, Personnel Administration, Project Management
COMMUNITY COORDINATING	Administrative Role Theory, Budget Analysis/Planning, Group Conflict Management, Group Process, Health Care, Interpersonal Communications, Leadership Motivation, Management Theory/Techniques, Negotiation Theory/Technique, Organizational Psychology, Planning Methods, Public Relations
COUNSELING	Abnormal Psychology, Behavior Modification, Community Mental Health, Counseling Theory/Technique, Doctrine of Ministry, Developmental/Freudian/Gestalt Psychology, Group Therapy, Hospital Ministry, Intervention Theory, Jungian Psychology, Life Span Psychology, Marriage Counseling, Negotiation Theory/Technique, Nonverbal Communication, Pastoral Counseling/Theology, Personality Theory, Psychology of Aging/Religious Experience, Psychotherapeutic Theory/Practice, Reality Therapy, Rogerian Psychology, Sex Roles, Sociology of Family, Values Clarification

ROLE TERM	AREAS OF KNOWLEDGE WHICH MAY CONTRIBUTE MOST TO THE ROLE
CURRICULUM DESIGNING	Art Methods, Child Development, Communications Theory, Curriculum Analysis/Design, Educational Psychology, Instructional Media, Journalism, Learning Theory, Literary Analysis, Program Evaluation/Planning Theory, Programmed Instruction, Teaching Theory/Method, Thinking Process, AND CONTENT AREAS RELEVANT TO SUBJECT MATTER OF CURRICULUM
EDITING	Art Appreciation/Method, Content Analysis, Journalism, Literary Analysis, Poetic Expression, AND CONTENT AREAS RELEVANT TO SUBJECT MATTER
EDUCATIONAL ADMINISTERING	Administrative Role Theory, Budget Analysis/Planning, Cost Analysis, Curriculum Analysis/Development, Decision Processes, Educational Administration/Psychology, Group Process, Interpersonal Communications, Intervention Theory, Leadership Motivation, Management Theory/Technique, Measurement and Evaluation, Negotiation Theory/Techniques, Organizational/Change/Development/Diagnosis/Psychology, Personnel Administration, Program Evaluation and Planning Theory, Project Management, Public Administration/Relations, Religious Organizations, School Administration, Sociology of Knowledge/Organizations, Theory/Practice of Christian Education, Values in Education, AND RELEVANT CONTENT AREAS
EVANGELIZING	American Religious Experience, Biblical Literature, Church and Culture, Change Agentry, Doctrine of Christ/Holy Spirit/Salvation, Early Christianity, Folk Religion, History of Evangelism, Interpersonal Communications, Life of Jesus, Mass Media, Mission Strategy, Nonverbal Communication, New Testament Theology, Preaching Techniques, Psychology of Religious Experience, Public Relations, Science and Religion, Sects and Cults, Sociology of Religion, Values Clarification
FUND RAISING	Cost Analysis, Communications Theory, Computer Applications, Content Analysis, Decision Processes, Financial Planning, Interpersonal Communications, Investments, Leadership Motivation, Management Technique, Marketing Theory, Mass Media, Negotiation Theory/Technique, Nonverbal Communication, Program Evaluation and Planning Theory, Psychology of Communications, Public Relations, Research Methods, AND RELEVANT CONTENT AREAS

ROLE TERM	AREAS OF KNOWLEDGE WHICH MAY CONTRIBUTE MOST TO THE ROLE
HOSTESSING	Health Care, Home Management, Nonverbal Communication, Project Management, Recreation Administration
HOUSE MANAGING	Administrative Role Theory, Budget Analysis/Planning, Care of the Ill, Cost Analysis, Community Culture/Mental Health, Doctrine of Church, Group Conflict Management/Process, Health Care, Home Management, Interpersonal Communications, Management Theory/Techniques, Negotiation Theory/Techniques, Nonverbal Communication, Organizational Psychology, Personnel Administration, Public Relations, Purchasing Practices.
LEADERSHIP TRAINING	Behavior Theory, Change Agentry, Counseling Techniques, Group Process, Instructional Media, Interpersonal Communications, Leadership Motivation/Training, Measurement and Evaluation, Negotiation Theory/Techniques, Nonverbal Communication, Organizational Psychology, Program Evaluation and Planning Theory, Programmed Instruction, Project Management, Psychology of Perception, Teaching Theory/Method, Thinking Process, AND RELEVANT CONTENT AREAS
LIBRARY COORDINATING	Budget Analysis/Planning, Cost Analysis, Data Collection and Analysis, Information Systems, Instructional Media, Management Technique, Personnel Administration, Program Evaluation and Planning Theory, Purchasing Practices, Research Methods, AND RELEVANT CONTENT AREAS
MUSIC LEADING	Interpersonal Communications, Leadership Training, Liturgics, Music Performance/Theory/Teaching, Nonverbal Communication, Poetic Expression, Psychology of Religious Experience, Speech Theory and Technique
MUSIC PERFORMING	Music Performing/Theory, Nonverbal Communication, Poetic Expression, Speech Theory and Technique
OFFICE MANAGING	Administrative Role Theory, Budget Analysis, Cost Analysis, Group Conflict Management, Group Process, Interpersonal Communications, Negotiation Theory/Techniques, Personnel Administration, Purchasing Practices

ROLE TERM	AREAS OF KNOWLEDGE WHICH MAY CONTRIBUTE MOST TO THE ROLE
ORGANIZATIONAL ADMINISTERING	Accounting, Administrative Role Theory, Budget Analysis/Planning, Cost Analysis, Financial Planning, Group Conflict Management/Process, Interpersonal Communications, Management Theory/Technique, Negotiation Theory/Technique, Operations Analysis, Organizational Change/Development/Psychology, Personnel Administration, Program Evaluation and Planning Theory, Purchasing Practices, Sociology of Organizations
ORGANIZATIONAL CONSULTING	Administrative Role Theory, Arbitration Theory and Practice, Behavior Theory, Change Agentry, Communications Theory, Counseling Theory/Technique, Decision Processes, Financial Planning, Group Conflict Management/Process, Helping Philosophy, Interpersonal Communications, Intervention Theory, Leadership Motivation, Life Span Psychology, Management Theory/Technique, Manpower Analysis, Negotiation Theory/Techniques, Nonverbal Communication, Operations Analysis, Organizational Change / Development / Diagnosis Ecology/Psychology, Personality Theory, Program Evaluation and Planning Theory, Problem Solving Theory, Social Psychology, Values Clarification
PARISH MANAGING	Accounting, Administrative Role Theory, Budget Analysis/Planning, Church Polity, Change Agentry, Group Conflict Management/Process, Interpersonal Communications, Leadership Motivation/Training, Management Theory/Technique, Negotiation Theory/Technique, Nonverbal Communication, Organizational Change / Development / Psychology, Parish Administration/Development, Program Evaluation and Planning Theory, Public Relations
PASTORAL CARING	Community Culture/Mental Health, Counseling Theory/Techniques, Doctrine of Ministry/Sacraments, Family Counseling, Helping Philosophy, Hospital Ministry, Intervention Theory, Life Span Psychology, Ministry to Adults/Youth/Children/Elderly/Ill, Negotiation Theory/Technique, Nonverbal Communication, Pastoral Counseling, Personality Theory, Psychology of Aging/Religious Experience/Occupations, Social Psychology, Values Clarification, Welfare Counseling

ROLE TERM	AREAS OF KNOWLEDGE WHICH MAY CONTRIBUTE MOST TO THE ROLE
PERSONNEL ADMINISTERING	Accounting, Budget Analysis/Planning, Cost Analysis, Group Process, Information Systems, Labor Relations, Manpower Analysis, Negotiation Theory/Technique, Organizational Psychology, Personnel Administration, Planning Theory/Methods, Wage and Salary Administration
PREACHING	American Sub-Cultures, American Religious Experience, Communications Theory, Contemporary Symbol Systems, Content Analysis, Decision Processes, English Literature, Homiletics, Interpersonal Communications, Intervention Theory, Language and Culture, Literary Analysis, Liturgics, Nonverbal Communication, Psychology of Communications/Creativity/Religious Experience, Religion and Art, Research Methods, Sociology of Religion, Teaching Methods, Speech Theory and Techniques, AND RELEVANT CONTENT AREAS
PROGRAM ADMINISTERING	Administrative Role Theory, Budget Analysis/Planning, Cost Analysis, Leadership Motivation/Training, Management Technique, Nonverbal Communication, Organizational Psychology, Program Evaluation and Planning Theory, Project Management, AND RELEVANT CONTENT AREAS
PROGRAM DEVELOPING	American History, Content Analysis, Decision Theory, Program Evaluation and Planning Theory, Planning Methods, Problem Solving Theory, Psychology of Creativity, Thinking Process AND RELEVANT CONTENT AREAS
PUBLIC RELATIONS MANAGING	Change Agentry, Communications Theory, Interpersonal Communication, Intervention Theory, Marketing Theory, Mass Media, Public Relations, Sociology of Mass Communications, AND RELEVANT CONTENT AREAS
PUBLIC SPEAKING	Communications Theory, Interpersonal Communications, Intervention Theory, Nonverbal Communication, Poetic Expression, Psychology of Communications, Speech Theory and Technique AND RELEVANT CONTENT AREAS
RECREATION LEADING	Folk Music, Group Process, Health Care, Program Evaluation and Planning Theory, Recreation Administration

ROLE TERM	AREAS OF KNOWLEDGE WHICH MAY CONTRIBUTE MOST TO THE ROLE
RETREAT COORDINATING	Administrative Role Theory, Budget Analysis/Planning, Cost Analysis, Leadership Motivation/Training, Management Technique, Nonverbal Communication, Organizational Psychology, Program Evaluation and Planning Theory, AND RELEVANT CONTENT AREAS
RETREAT LEADING	Counseling Theory/Techniques, Group Process, Helping Philosophy, Interpersonal Communications, Intervention Theory, Liturgics, Pastoral Counseling/Theology, Preaching Theory/Techniques, Psychology of Religious Experience, Teaching Methods, Values Clarification AND RELEVANT CONTENT AREAS
SOCIAL WORKING	Community Mental Health, Counseling Theory/Technique, Local Government, Health Care, Helping Philosophy, Intervention Theory, Marriage/Pastoral Counseling, Sociology of the Disadvantaged/Family, Social Psychology, Social Welfare Policy, Welfare Counseling
SPIRITUAL DIRECTING	Abnormal Psychology, Behavior Modification, Career Development, Community Mental Health, Counseling Theory/Technique, Doctrine of Ministry, Developmental Psychology, Freudian Psychology, Gestalt Psychology, Group Therapy, Hospital Ministry, Intervention Theory, Jungian Psychology, Life Span Psychology, Marriage Counseling, Negotiation Theory/Techniques, Nonverbal Communication, Pastoral Counseling, Pastoral Theology, Personality Theory, Psychology of Aging/Religious Experience/Occupations, Psychotherapeutic Theory/Practice, Reality Therapy, Rogerian Psychology, Sex Roles, Sociology of Family, Trans-Actional Analysis, Values Clarification, AND RELEVANT CONTENT AREAS
TEACHING	Art Methods, Content Analysis, Curriculum Analysis/Development, Developmental Psychology, Instructional Media, Interpersonal Communications, Intervention Theory, Life Span Psychology, Personality Theory, Programmed Instruction, Teaching Theory/Methods, Thinking Process AND RELEVANT CONTENT AREAS
WRITING	Communications Theory, Content Analysis, English Literature, Journalism, Poetic Expression, Psychology of Communications, Thinking Process, AND RELEVANT CONTENT AREAS
WORSHIP LEADING	See suggestions under "Preaching."

KEY TO ABILITY ANALYSIS OF ROLES

THE following analysis of roles according to "Abilities Almost Always Used" is meant to be suggestive, not exclusive. As you use it to assist you in analyzing *your roles*, refer also to the ABILITIES DEFINITIONS list found in AN ANALYSIS OF ABILITY. Consider *your* role definitions and your situation and style in completing the ability column on each of the Role Effectiveness Profiles.

ROLE TERM	ABILITIES ALMOST ALWAYS USED
ARBITRATING	OBSERVE, ANALYZE, SYNTHESIZE, NEGOTIATE
BOOK-KEEPING	OBSERVE, COPY, COMPUTE, CLASSIFY
BUILDINGS MANAGING	OBSERVE, ANALYZE, COORDINATE, NEGOTIATE, SUPERVISE, MAINTAIN
CLERKING	OBSERVE, COPY, CLASSIFY
COMMUNITY COORDINATING	OBSERVE, ANALYZE, COORDINATE, ORGANIZE, SUPERVISE, NEGOTIATE
COUNSELING	OBSERVE, ANALYZE, SYNTHESIZE, SUPERVISE, NEGOTIATE, MENTOR
CURRICULUM DESIGNING	OBSERVE, RESEARCH, COPY, CLASSIFY, ANALYZE, SYNTHESIZE, CREATIVE SYNTHESIS, WRITE, DESIGN
EDITING	OBSERVE, ANALYZE, COORDINATE, NEGOTIATE, DESIGN
EDUCATION ADMINISTERING	OBSERVE, ANALYZE, SYNTHESIZE, COORDINATE, INSTRUCT, SUPERVISE, MANAGE, NEGOTIATE, TEACH
EVANGELIZING	OBSERVE, ANALYZE, SPEAK, PERSUADE, TEACH, NEGOTIATE, MENTOR
FOOD SERVING	OBSERVE, CLASSIFY, PERFORM, COORDINATE, OPERATE, MAINTAIN, COLLECT
FUND RAISING	OBSERVE, RESEARCH, COMPUTE, CLASSIFY, ANALYZE, SPEAK, PERSUADE, COORDINATE, SUPERVISE, MANAGE, NEGOTIATE, FINANCE
HOSTESSING	OBSERVE, ANALYZE, COORDINATE, SUPERVISE, NEGOTIATE
HOUSE MANAGING	OBSERVE, COMPUTE, CLASSIFY, ANALYZE, PERSUADE, COORDINATE, INSTRUCT, SUPERVISE, MANAGE, NEGOTIATE, MAINTAIN, PURCHASE

ROLE TERM	ABILITIES ALMOST ALWAYS USED
LEADERSHIP TRAINING	OBSERVE, RESEARCH, ANALYZE, SNYTHESIZE, SPEAK, PERFORM, PERSUADE, COORDINATE, INSTRUCT, TEACH, SUPERVISE, MANAGE, NEGOTIATE
LIBRARY COORDINATING	OBSERVE, COPY, CLASSIFY, COORDINATE, MAINTAIN, COLLECT, PURCHASE
MIMEOGRAPHING	OBSERVE, COPY, COMPUTE, OPERATE
MUSIC LEADING	OBSERVE, RESEARCH, ANALYZE, SYNTHESIZE, PERFORM, COORDINATE, NEGOTIATE, ARTISTIC PRESENTATION
MUSIC PERFORMING	OBSERVE, ANALYZE, PERFORM, COORDINATE, ARTISTIC PRESENTATION
OFFICE MANAGING	OBSERVE, COMPUTE, CLASSIFY, ANALYZE, SYNTHESIZE, PERSUADE, COORDINATE, INSTRUCT, SUPERVISE, MANAGE, NEGOTIATE, MAINTAIN, PURCHASE
ORGANIZATION ADMINISTERING	OBSERVE, ANALYZE, SYNTHESIZE, PERSUADE, COORDINATE, ORGANIZE, SUPERVISE, NEGOTIATE, FINANCE, MAINTAIN
ORGANIZATIONAL CONSULTING	OBSERVE, ANALYZE, SYNTHESIZE, PERSUADE, NEGOTIATE, MENTOR
PARISH MANAGING	OBSERVE, ANALYZE, SYNTHESIZE, PERSUADE, COORDINATE, ORGANIZE, SUPERVISE, NEGOTIATE, FINANCE, MAINTAIN
PASTORAL CARING	OBSERVE, ANALYZE, COORDINATE, MENTOR
PERSONNEL ADMINISTERING	OBSERVE, ANALYZE, PERSUADE, COORDINATE, INSTRUCT, SUPERVISE, NEGOTIATE
PREACHING	OBSERVE, RESEARCH, COPY, ANALYZE, SYNTHESIZE, WRITE, SPEAK, PERFORM, PERSUADE, TEACH
PROFESSIONAL LEADING	OBSERVE, ANALYZE, SYNTHESIZE, SPEAK, PERSUADE, ORGANIZE, NEGOTIATE
PROGRAM ADMINISTERING	OBSERVE, ANALYZE, SYNTHESIZE, WRITE, PERSUADE, COORDINATE, ORGANIZE, SUPERVISE, MANAGE, NEGOTIATE, MAINTAIN
PROGRAM DEVELOPING	OBSERVE, RESEARCH, ANALYZE, SYNTHESIZE, CREATIVE SYNTHESIS, WRITE, COORDINATE, ORGANIZE, DESIGN
PUBLIC RELATIONS MANAGING	OBSERVE, ANALYZE, SYNTHESIZE, WRITE, SPEAK, PERFORM, PERSUADE, COORDINATE, SUPERVISE

ROLE TERM	ABILITIES ALMOST ALWAYS USED
PUBLIC SPEAKING	OBSERVE, ANALYZE, SYNTHESIZE, SPEAK, PERFORM
PURCHASING	OBSERVE, COMPUTE, CLASSIFY, ANALYZE, COORDINATE, MAINTAIN, PURCHASE
RECORDS KEEPING	OBSERVE, COPY, CLASSIFY, OPERATE, MAINTAIN, COLLECT
RECREATION LEADING	OBSERVE, ANALYZE, SYNTHESIZE, PERFORM, COORDINATE, INSTRUCT, SUPERVISE
RETREAT COORDINATING	OBSERVE, ANALYZE, SYNTHESIZE WRITE, SPEAK, PERFORM, COORDINATE, ORGANIZE, SUPERVISE, MANAGE, NEGOTIATE
RETREAT LEADING	OBSERVE, RESEARCH, ANALYZE, SYNTHESIZE, SPEAK, PERSUADE, COORDINATE, TEACH, MENTOR
SOCIAL WORKING	OBSERVE, RESEARCH, ANALYZE, SYNTHESIZE, PERSUADE, COORDINATE, INSTRUCT, NEGOTIATE, MENTOR
SPIRITUAL DIRECTING	OBSERVE, RESEARCH, ANALYZE, SYNTHESIZE, SPEAK, PERSUADE, COORDINATE, TEACH, MENTOR
TEACHING	OBSERVE, RESEARCH, ANALYZE, SYNTHESIZE, WRITE, SPEAK, PERFORM, PERSUADE, COORDINATE, INSTRUCT, TEACH, SUPERVISE, NEGOTIATE, MENTOR
VISITING	OBSERVE, ANALYZE, NEGOTIATE
WRITING	OBSERVE, RESEARCH, COPY, CLASSIFY, ANALYZE, SNYTHESIZE, WRITE, PERSUADE, COORDINATE
WORSHIP LEADING	OBSERVE, RESEARCH, COPY, ANALYZE, SYNTHESIZE, SPEAK, PERFORM

ROLE EFFECTIVENESS PROFILE

INSTRUCTIONS FOR COMPLETING THIS PROFILE ARE GIVEN ON PAGE 1, PART III.

ROLE TERM: ____

MY DEFINITION OF IT: ____________________________________

____

____

SITUATIONAL FACTORS TO REMEMBER WHEN ANALYZING EFFECTIVENESS

REQUIREMENTS FOR THIS ROLE: _____________________________

____

____

ACCORDING TO MY ANALYSIS, IN CONSULTATION WITH OTHERS, THIS ROLE WILL REQUIRE THE FOLLOWING FOR MOST EFFECTIVE PRACTICE:

KNOWLEDGE	ABILITIES

ROLE EFFECTIVENESS PROFILE

INSTRUCTIONS FOR COMPLETING THIS PROFILE ARE GIVEN ON PAGE 1, PART III.

ROLE TERM: ______________________________

MY DEFINITION OF IT: ______________________________

____

____

SITUATIONAL FACTORS TO REMEMBER WHEN ANALYZING EFFECTIVENESS

REQUIREMENTS FOR THIS ROLE: ______________________________

____

____

ACCORDING TO MY ANALYSIS, IN CONSULTATION WITH OTHERS, THIS ROLE WILL REQUIRE THE FOLLOWING FOR MOST EFFECTIVE PRACTICE:

KNOWLEDGE	ABILITIES

BEST COPY AVAILABLE

BEST COPY AVAILABLE

ROLE EFFECTIVENESS PROFILE

INSTRUCTIONS FOR COMPLETING THIS PROFILE ARE GIVEN ON PAGE 1, PART III.

ROLE TERM: ______________________________

MY DEFINITION OF IT: ______________________________

____

____

SITUATIONAL FACTORS TO REMEMBER WHEN ANALYZING EFFECTIVENESS

REQUIREMENTS FOR THIS ROLE: ______________________________

____

____

ACCORDING TO MY ANALYSIS, IN CONSULTATION WITH OTHERS, THIS ROLE WILL REQUIRE THE FOLLOWING FOR MOST EFFECTIVE PRACTICE:

KNOWLEDGE	ABILITIES

BEST COPY AVAILABLE

ROLE EFFECTIVENESS PROFILE

INSTRUCTIONS FOR COMPLETING THIS PROFILE ARE GIVEN ON PAGE 1, PART III.

ROLE TERM: ______________________________

MY DEFINITION OF IT: ______________________________

____

____

SITUATIONAL FACTORS TO REMEMBER WHEN ANALYZING EFFECTIVENESS

REQUIREMENTS FOR THIS ROLE: ______________________________

____

____

ACCORDING TO MY ANALYSIS, IN CONSULTATION WITH OTHERS, THIS ROLE WILL REQUIRE THE FOLLOWING FOR MOST EFFECTIVE PRACTICE:

KNOWLEDGE	ABILITIES

BEST COPY AVAILABLE

ROLE EFFECTIVENESS PROFILE

INSTRUCTIONS FOR COMPLETING THIS PROFILE ARE GIVEN ON PAGE 1, PART III.

ROLE TERM: ______________________________

MY DEFINITION OF IT: ______________________________

____

____

SITUATIONAL FACTORS TO REMEMBER WHEN ANALYZING EFFECTIVENESS

REQUIREMENTS FOR THIS ROLE: ______________________________

____

____

ACCORDING TO MY ANALYSIS, IN CONSULTATION WITH OTHERS, THIS ROLE WILL REQUIRE THE FOLLOWING FOR MOST EFFECTIVE PRACTICE:

KNOWLEDGE	ABILITIES

ROLE EFFECTIVENESS PROFILE

INSTRUCTIONS FOR COMPLETING THIS PROFILE ARE GIVEN ON PAGE 1, PART III.

ROLE TERM: ______________________________

MY DEFINITION OF IT: ______________________________

____

____

SITUATIONAL FACTORS TO REMEMBER WHEN ANALYZING EFFECTIVENESS

REQUIREMENTS FOR THIS ROLE: ______________________________

____

____

ACCORDING TO MY ANALYSIS, IN CONSULTATION WITH OTHERS, THIS ROLE WILL REQUIRE THE FOLLOWING FOR MOST EFFECTIVE PRACTICE:

KNOWLEDGE	ABILITIES

ROLE EFFECTIVENESS PROFILE

INSTRUCTIONS FOR COMPLETING THIS PROFILE ARE GIVEN ON PAGE 1, PART III.

ROLE TERM: ____________________

MY DEFINITION OF IT: ____________________

____

____

SITUATIONAL FACTORS TO REMEMBER WHEN ANALYZING EFFECTIVENESS

REQUIREMENTS FOR THIS ROLE: ____________________

____

____

ACCORDING TO MY ANALYSIS, IN CONSULTATION WITH OTHERS, THIS ROLE WILL REQUIRE THE FOLLOWING FOR MOST EFFECTIVE PRACTICE:

KNOWLEDGE	ABILITIES

ROLE EFFECTIVENESS PROFILE

INSTRUCTIONS FOR COMPLETING THIS PROFILE ARE GIVEN ON PAGE 1, PART III.

ROLE TERM: ______________________________

MY DEFINITION OF IT: ______________________________

____

____

SITUATIONAL FACTORS TO REMEMBER WHEN ANALYZING EFFECTIVENESS

REQUIREMENTS FOR THIS ROLE: ______________________________

____

____

ACCORDING TO MY ANALYSIS, IN CONSULTATION WITH OTHERS, THIS ROLE WILL REQUIRE THE FOLLOWING FOR MOST EFFECTIVE PRACTICE:

KNOWLEDGE	ABILITIES

STEP TWO

KNOWLEDGE EVALUATION

FIRST, REMOVE from the Plan Book, your *Profile of Self* (Page 6 of Part II).

THEN, compare the KNOWLEDGE column on the *Profile of Self* with *each* KNOWLEDGE column on the *Role Effectiveness Profiles* (Pages 12-19 of this Part).

AS you compare the columns, *UNDERLINE* any area of knowledge listed on an effectiveness profile which is not mentioned on your Profile of Self.

SECOND, REVIEW the effectiveness profiles again and consider which of the areas of knowledge you have underlined are the most essential to effectiveness in the role: CIRCLE them.

THIRD, LIST below all of the areas of knowledge you have circled on the effectiveness profiles. If an area is circled on more than one profile, then indicate the number of times it is mentioned.

AREAS OF KNOWLEDGE NEEDING ATTENTION

______________ ______________ ______________
______________ ______________ ______________
______________ ______________ ______________
______________ ______________ ______________
______________ ______________ ______________
______________ ______________ ______________
______________ ______________ ______________

FOURTH, CONSIDER all of the areas of knowledge you have listed above and keeping in mind everything you know about yourself, your situation, the feedback you have received, note below the areas you feel need attention most significantly – as soon as possible.

AREAS OF KNOWLEDGE FOR ATTENTION SOON

______________ ______________ ______________
______________ ______________ ______________
______________ ______________ ______________

____

STEP THREE

ABILITIES EVALUATION

A IN the space provided below by each ability factor, note the number of times each ability is mentioned on your Role Effectiveness Profiles (Pages 12-19 of this Part).

___ OBSERVE
___ RESEARCH
___ COPY
___ COMPUTE
___ CLASSIFY
___ ANALYZE
___ SYNTHESIZE
___ WRITE
___ SPEAK

___ PERFORM
___ PERSUADE
___ COORDINATE
___ ORGANIZE
___ INSTRUCT
___ TEACH
___ SUPERVISE
___ MANAGE
___ NEGOTIATE

___ MENTOR
___ ARTISTIC P.
___ FINANCE
___ OPERATE/PLAY
___ MAINTAIN
___ COLLECT
___ PURCHASE
___ BUILD
___ DESIGN

B COMPARE the above list with your *Profile of Self* (Page 6 of Part II) and CIRCLE any ability which the above notations (used once or more in your roles) indicate to be important to your roles but which does not appear on your Profile of Self.

C CONSIDER the relative strength of the abilities listed on your Profile of Self in comparison with the significance of the abilities mentioned above. If you feel your strength in the ability is less than demanded, even though it is one of your meaningful effective abilities, CIRCLE it in the list above. Pay particular attention to those abilities which are important to several roles.

D REVIEW the abilities circled in the above list and, remembering what this experience and previous feedback and reflection have indicated about your abilities, note below the abilities which you feel need attention most significantly — as soon as possible.

ABILITIES FOR ATTENTION SOON

STEP FOUR

CHARACTERISTICS EVALUATION

YOU are asked in this step to take the insight into your personality characteristics which you developed in doing the "Survey of Characteristics" and in the "Consultative Review of Characteristics" and convert it into developmental needs statements. Do this by marking an *X* by each developmental need which is true for you.

BEFORE proceeding, however, read the statement in the box below; also, refer back to your summary of significant characteristics (Page 6, Part II) and to the "Survey of Characteristics" booklet.

A WORD ABOUT ROLES AND CHARACTERISTICS

WE have made no attempt to compare characteristics directly with each role, as we did with knowledge and abilities. It is possible to do this and such an approach was followed in the first edition of the Plan Book. Such an approach is time-consuming, however, and does not produce results much different from those gained when the characteristics are considered in general, with respect to the dynamic of your total person. You will find it helpful, though, to keep in mind the roles you intend to practice, and to raise questions with yourself and with your consultant(s) about the *relative* importance of specific characteristics in the light of the roles. In other words, while general personality development is always helpful, it may be more important to focus on specific needs in the light of the roles you fulfill.

CHARACTERISTICS DEVELOPMENT NEEDS

(Numbers in parentheses refer to scales
in the "Survey of Characteristics")

___ Reduce tiredness (1)
___ Increase Intellectual Agility (2)
___ Increase Rational Approach (3)
___ Increase Intuitive-Emotional (3)
___ Increase Idea Flexibility (4)
___ Increase Evaluative Attitude (4)
___ Increase Experimental Freedom (5)
___ Increase Respect for Tradition (5)
___ Increase Achievement Need (6)
___ Increase Process Concern (6)
___ Decrease Conscientious Rigidity (7)
___ Increase Conscientiousness (7)
___ Decrease Extraversion (8)
___ Decrease Introversion (8)
___ Increase Leadership Need (9)
___ Increase Adaptability (9)
___ Decrease Group Dependency (10)
___ Increase Group Orientation (10)
___ Decrease Assertive Rigidity (11)
___ Increase Assertiveness (11)
___ Reduce Emotional Vulnerability (12)
___ Increase Emotional Sensitivity (12)
___ Decrease Agenda Rigidity (13)
___ Increase Agenda-Consciousness (13)
___ Increase Spontaneity (13)
___ Reduce Tension (14)
___ Increase Intentional Anxiety (14)
___ Decrease Tenacious Rigidity (15)
___ Increase Tenaciousness (15)
___ Decrease Impulsivity (16)
___ Increase Enthusiasm (16)
___ Increase Ego-Strength (17)
___ Decrease Guilt-Proneness (18)

STEP FIVE

CHECK FOR MEANING

THROUGHOUT the Plan Book we have emphasized the importance of a concern for *meaning* as well as for effectiveness in ministry. You must find purposeful satisfaction in what you do — in the use of knowledge, abilities and characteristics — as well as in the results of your efforts if ministry is to be fulfilling to you as well as effective. Thus far, in Part III, however, we have focused upon effectiveness.

NOW CONSIDER MEANING: What emphases in the development of knowledge, abilities and characteristics do you need to make in your developmental planning in order to increase your own sense of purposeful satisfaction? Review each developmental category, referring back if you need, to the booklets in Part I, and note below areas for attention because they are important to your search for meaning.

(1) KNOWLEDGE AREAS I would like to develop (anew or further) in order to increase meaning:

(2) ABILITIES I would like to develop (anew or further) in order to increase meaning:

(3) CHARACTERISTICS I would like to work on in order to increase meaning:

(4) DOUBLE-CHECK: Review the notes you have made above and indicate below which areas of knowledge, which abilities, and which characteristics you feel *very strong* about emphasizing in the near future for increase in meaning. List them below:

FOR ATTENTION (TO INCREASE MEANING) SOON

KNOWLEDGE	ABILITIES	CHARACTERISTICS

STEP SIX

DEVELOPMENTAL NEEDS SUMMARY

ON Pages 20, 21, 22 and 23 you have noted specific needs you have for development in the categories of Knowledge, Abilities and Characteristics. You have considered both *effectiveness* and *meaningfulness*. NOW, complete the chart below by reviewing those pages and prioritizing the needs in each category. KEEP IN MIND the roles you must fulfill, consultative feedback gained in this process, concerns expressed by laypersons and/or supervisors. Be sure you consider Page 23 as well as Pages 20, 21, and 22.

DEVELOPMENTAL NEEDS PRIORITIES			
	KNOWLEDGE (Pages 20, 23)	ABILITIES (Pages 21, 23)	CHARACTERISTICS (Pages 22, 23)
PRIORITY ONE			
PRIORITY TWO			
PRIORITY THREE			
PRIORITY FOUR			
PRIORITY FIVE			
PRIORITY SIX			
PRIORITY SEVEN			
PRIORITY EIGHT			
PRIORITY NINE			
PRIORITY TEN			

THE S.R.D. MIN. PLAN BOOK

PART IV

DEVELOPMENTAL PLANNING GUIDE

P
A
R
T

IV

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INTRODUCTION

FOLLOWING Page 2, you will find four worksheets for use in designing and recording DEVELOPMENTAL PLANS FOR ACTION on an annual basis. These will help you organize the insights gained from Parts I through III into specific plans for your development. It is the objective of this Part to assist you in completing *one* of the worksheets. Your consultant and/or group will be very important to you as you make such plans.

STEP ONE: DETERMINING POSSIBLE DEVELOPMENTAL PROCESSES

1. Fill in your name on one of the worksheets. Determine the beginning date for your developmental program and record it in the space provided. Preferably this should be a date immediately following completion of this process, but there may be reasons for setting a later date.

2. Refer to the DEVELOPMENTAL NEEDS PRIORITIES chart which you completed at the end of Part III. Choose from it the areas of *knowledge*, the *abilities* and the *characteristics* which should be given attention in the first year. Ordinarily PRIORITY ONE items would be chosen along with others which you feel are important to "get on with" fairly soon. Your consultant and/or group will help you in the choice of items for first year emphasis. Write your choices into the space on the worksheet marked: *KAC SPECIFICS.*

3. You will note that there are six *PROCESS CATEGORIES* listed:

   A. *INDEPENDENT STUDY:* This refers to study which you might do on your own, in a disciplined way.

   B. *PROFESSIONAL ENDEAVORS:* This refers to ministry responsibilities you may want to emphasize in order to increase meaning and effectiveness by using the knowledge, abilities and characteristics involved.

   C. *COLLEAGUE GROUPS:* Consider what might be done in a disciplined way with a group of your local colleagues.

   D. *PERSONAL EXPERIENCE:* Record here private therapy, marriage counseling and other such developmental experiences to be considered and carried out with professional assistance.

   E. *WORKSHOPS/SEMINARS:* This refers to short-term activities related to particular subject areas or skills.

   F. *FORMAL COURSES:* Write into these spaces any courses, degree or not, offered by educational institutions.

With the help of your consultant and/or group, try to write something in each space, so that you have a wide variety of PROCESS POSSIBILITIES recorded. They should all relate to the KAC at the top of the chart.

STEP TWO: SETTING SPECIFIC OBJECTIVES

FROM all of the PROCESS POSSIBILITIES entered in STEP ONE, choose those which you think and feel you should definitely try to accomplish during the first year of development. Fill in the spaces as follows:

WHAT: The specific processes chosen from the chart.

HOW: The specific persons, places, organizations with whom you might work.

WHEN: The specific date by which you hope to begin the process indicated.

STEP THREE: NOTING ROLES WHICH WILL BE ENHANCED

IT is important now that you remember the ESSENTIAL ROLES of your ministry and be sure that the specific objectives set in Step Two relate to them. It is not necessary, of course, that the objectives relate to every role but you want to be sure that roles about which you have special concern at this time are covered by the objectives you have set for the immediate future. Check this by looking again at the ROLE EFFECTIVENESS PROFILES you prepared in Part III of the Plan Book. They are Pages 12-19. Note the roles which will benefit from the objectives stated in the block provided on the Plan for Action sheet. IF your plans seem irrelevant to roles, or insufficiently relevant, reconsider the objectives.

THE FUTURE THE FUTURE THE FUTURE THE FUTURE THE FUTURE

YOU have now experienced and learned a process for making developmental plans which will increase your meaningful effectiveness in ministry. You have followed procedures which have encouraged you to reflect about yourself, consult about that reflection, re-consult, and then to PLAN specific activities for accomplishing the objectives you have set. As you proceed with your first year's plan, give thought to the second year and map out a specific plan for it, again referring to Page 24 of Part III (Developmental Needs Summary) and considering insights gained during the first year. Do this each year. Three additional Plan for Action sheets are included in the book for you to use in projecting such plans. You may make additional copies yourself (this is permission to copy *only* the plan sheet and not any other part of the Plan Book) or you may obtain additional copies for a nominal charge from The Center for Professional Development in Ministry, 561 College Avenue, Lancaster, Pa. 17603.

ATTENTION DOCTOR OF MINISTRY APPLICANTS

YOU may find it helpful to complete the *D.MIN. SUMMARY REPORT* form which is the last item in the Plan Book. All of the information you need to complete it is contained in the Plan Book.

THE S.R.D.MIN. PLAN BOOK

DEVELOPMENTAL PLANS FOR ACTION

INTENDED BY ______________________ FOR THE YEAR

BEGINNING ______________, 19___

STEP ONE: DETERMINING POSSIBLE DEVELOPMENTAL PROCESSES	DEVELOPMENTAL CATEGORIES:	KNOWLEDGE	ABILITIES	CHARACTERISTICS
	KAC SPECIFICS TO BE DEVELOPED DURING THIS YEAR:			
	A. INDEPENDENT STUDY:			
	B. PROFESSIONAL ENDEAVORS:			
	C. COLLEAGUE GROUPS:			
	D. PERSONAL EXPERIENCES:			
	E. WORKSHOPS/ SEMINARS:			
	F. FORMAL COURSES:			

STEP TWO: SPECIFIC OBJECTIVES		1	2	3	4
	WHAT:				
	HOW:				
	WHEN:				

STEP THREE:	ROLES WHICH THIS YEAR'S ACTION WILL ENHANCE

THE S.R.D.MIN. PLAN BOOK

DEVELOPMENTAL PLANS FOR ACTION

INTENDED BY ______________________ FOR THE YEAR

BEGINNING ______________, 19___

STEP ONE: DETERMINING POSSIBLE DEVELOPMENTAL PROCESSES	DEVELOPMENTAL CATEGORIES:	KNOWLEDGE	ABILITIES	CHARACTERISTICS
	KAC SPECIFICS TO BE DEVELOPED DURING THIS YEAR:			
	A. INDEPENDENT STUDY:			
	B. PROFESSIONAL ENDEAVORS:			
	C. COLLEAGUE GROUPS:			
	D. PERSONAL EXPERIENCES:			
	E. WORKSHOPS/ SEMINARS:			
	F. FORMAL COURSES:			

STEP TWO: SPECIFIC OBJECTIVES		1	2	3	4
	WHAT:				
	HOW:				
	WHEN:				

STEP THREE:	ROLES WHICH THIS YEAR'S ACTION WILL ENHANCE

THE S.R.D.MIN. PLAN BOOK

DEVELOPMENTAL PLANS FOR ACTION

INTENDED BY ______________________________ FOR THE YEAR

BEGINNING ________________, 19___

STEP ONE: DETERMINING POSSIBLE DEVELOPMENTAL PROCESSES	**DEVELOPMENTAL CATEGORIES:**	**KNOWLEDGE**	**ABILITIES**	**CHARACTERISTICS**
	KAC SPECIFICS TO BE DEVELOPED DURING THIS YEAR:			
	A. INDEPENDENT STUDY:			
	B. PROFESSIONAL ENDEAVORS:			
	C. COLLEAGUE GROUPS:			
	D. PERSONAL EXPERIENCES:			
	E. WORKSHOPS/ SEMINARS:			
	F. FORMAL COURSES:			

STEP TWO: SPECIFIC OBJECTIVES	**WHAT:**	**1**	**2**	**3**	**4**
	HOW:				
	WHEN:				

STEP THREE:	**ROLES WHICH THIS YEAR'S ACTION WILL ENHANCE**

THE S.R.D.MIN. PLAN BOOK

DEVELOPMENTAL PLANS FOR ACTION

INTENDED BY ______________________________ FOR THE YEAR

BEGINNING _________________, 19___

STEP ONE: DETERMINING POSSIBLE DEVELOPMENTAL PROCESSES	DEVELOPMENTAL CATEGORIES:	KNOWLEDGE	ABILITIES	CHARACTERISTICS
	KAC SPECIFICS TO BE DEVELOPED DURING THIS YEAR:			
	A. INDEPENDENT STUDY:			
	B. PROFESSIONAL ENDEAVORS:			
	C. COLLEAGUE GROUPS:			
	D. PERSONAL EXPERIENCES:			
	E. WORKSHOPS/ SEMINARS:			
	F. FORMAL COURSES:			

STEP TWO: SPECIFIC OBJECTIVES	WHAT:	1	2	3	4
	HOW:				
	WHEN:				

STEP THREE:	ROLES WHICH THIS YEAR'S ACTION WILL ENHANCE

(Type or Use Black Ink to Complete)

SUMMARY STATEMENT OF RESOURCES AND PLANS SUBMITTED TO THE D. MIN. STUDIES COMMITTEE OF ______________________ SEMINARY

BY ______________________________ DATE ______________

ON the basis of the survey of personal resources for development in ministry I have made in using the S.R.D.MIN. PLAN BOOK under the supervision of ____________ ______________ on the days of ____________ 19___, I submit the following summary statement of resources and plans for my development:

1. I shall bring to D.Min. studies the following resources:
(To complete this statement, refer to the PLAN BOOK, Part II, Page 6, "A Summary Profile of Self.")

AREAS OF GREATEST KNOWLEDGE	MOST MEANINGFUL/EFFECTIVE ABILITIES	MOST SIGNIFICANT ENABLING CHARACTERISTICS

2. THE KNOWLEDGE, ABILITIES AND CHARACTERISTICS I hope to develop further through participation in the D.Min. program are: (TO complete this statement, refer to the PLAN BOOK, Part IV, "Developmental Plans for Action," and to Part III, Page 24, "Developmental Needs Summary."

AREAS OF KNOWLEDGE FOR DEVELOPMENT	ABILITIES FOR DEVELOPMENT	CHARACTERISTICS FOR DEVELOPMENT

(OVER)

3. This study should lead to increased competency and enhancement of the meaning I find in fulfilling the following ministry roles which are essential to my ministry:

Ministry Roles for Development in D.Min. Program:

4. This survey of resources has led me to consider the following as possible projects which I might consider completing as part of my D.Min. studies:

Project Possibilities:

SIGNED ______________________________
APPLICANT FOR D.MIN. STUDIES

STATEMENT BY SUPERVISOR

I certify that I have supervised the above-named person in a survey of personal resources for development in ministry and agree with the plans outlined above, as specifically relevant to his/her survey of resources and developmental needs, with the following additions or exceptions:

SIGNED ______________________ DATE ____________
SUPERVISOR